



# 2020 Visitor Profile Research

*Report Prepared February 2021*





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### VOICE OF THE VISITOR RESEARCH

## Overview

**Purpose.** The purpose of conducting the Visitor Profile Study for the Branson Convention & Visitors Bureau is to provide area decision makers a behavioral, demographic and trend comparison of Branson travelers over the course of the year. This information provides marketers and other decision makers with near real-time information throughout the year via the online dashboard as to who is visiting Branson and where the greatest changes are occurring.

**Target Audience.** Contact information collected from Branson visitors from more than 25 locations around the Branson area was used to interview visitors via email.

**Sample.** A total of 1,390 Branson visitors were interviewed for this study throughout the year, providing a maximum margin of error of +/-2.6% at a 95% confidence interval – considered comparatively strong by industry standards.



Branson 2020 Visitor Profile Research

# Key Takeaways





# Key Takeaways

- **Pandemic Impacts Visitation.** There's no getting around it, Covid-19 had a significant impact on travel around the country. For Branson, 2020 visitation is projected to settle at nearly 31% below the record-setting visitation of 9.1M in 2019.
- **2020 Visitation Fueled by Regional and Repeat Travelers.** The pandemic also impacted the composition of those who visited the area. Consumers still had a desire to get out and do things outside of the home but were significantly\* more likely to stay closer to home in 2020. This was true for Branson as well, as those visiting were nearly 8 points more likely to have visited from within 300 miles of the area. Furthermore, the high level of repeat visitors seen in 2019 (81%) held steady in 2020 (82%)—meaning travelers were visiting destinations (especially Branson) they were most familiar with during the pandemic.
- **Local Media Influence.** While in the area, visitors were most likely to use local media such as brochures (56%) and billboards (48%) to get information about activities and attractions. However, it's the Official Branson Vacation Guide (67%) that was most influential in their decision making. This was followed by brochures (57%) and local coupon books (56%).





# Key Takeaways

- **Rubber Tire Visitors.** Despite an increase in regional visitors within 300 miles the number of visitors who used a personal vehicle to travel to the area remained consistent with last year (82%); A small number of visitors chose to fly (4%) and most of them used the Springfield-Branson National Airport (64%, -4pts). There was, however, an up-tick in “other” airports in the area (+6pts) while the Branson airport carried about 7% of air-travel visitors.
- **Demographics Shift.** The pandemic caused a shift in the demographics of those who were still able to visit. The 2020 visitor was 2 years older, 7pts more likely to be over the age of 55, 8pts more likely to be in an adult-only party, earned a significantly higher household income and was 7pts less likely to have visited from beyond 300 miles.
- **Shifts in Market Drivers.** Live shows remain Branson’s biggest functional driver of visitation with Silver Dollar City placing second and Shopping third.





# Key Takeaways

- **Visitor Spending Increases.** On average, Branson visitor parties spent \$1,063 during their stay in 2020. This is the highest average visitor spend ever recorded. This was likely due to an increase in high-income visitors in 2020.
- **Branson Continues to Generate Strong Market Buzz and Intent to Return.** Branson's Net Promoter Score (NPS) increased to 65% in 2020, an increase of 2 points over last year's record-breaking score. This is driven by 72% of visitors indicating they would recommend Branson to friends/family with only 7% indicating they would not. Likewise, 89% indicated they probably/definitely will return, on par with last year and the Historical Average of 88%.
- **Trip Planning is Taking Longer.** Despite the fact that there was an increase in regional visitation, the Covid-19 pandemic has made trip planning a bit harder. Therefore, it's not surprising to see that the average trip to Branson took 78 days to plan—up from just 64 days last year. We expect to see this trend continue throughout 2021, and possibly longer depending on how quickly the pandemic can be handled.







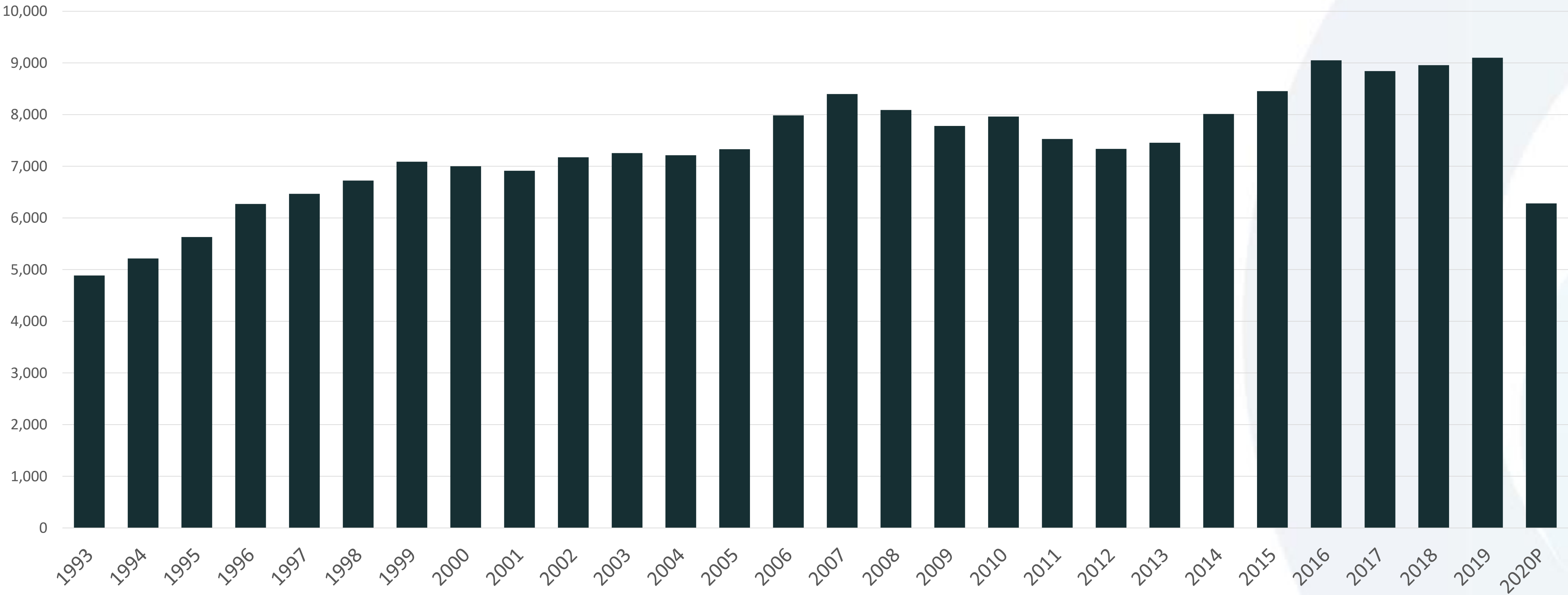
Branson 2020 Visitor Profile Research

# Key Performance Indicators



**Covid-19 had a major impact on visitation in 2020. Visitation is projected to be 6.3M compared to 2019's record setting 9.1M visits. But, as always, final visitation numbers will not be available until the end of Feb.**

History of Visitation to Branson (000s)\*



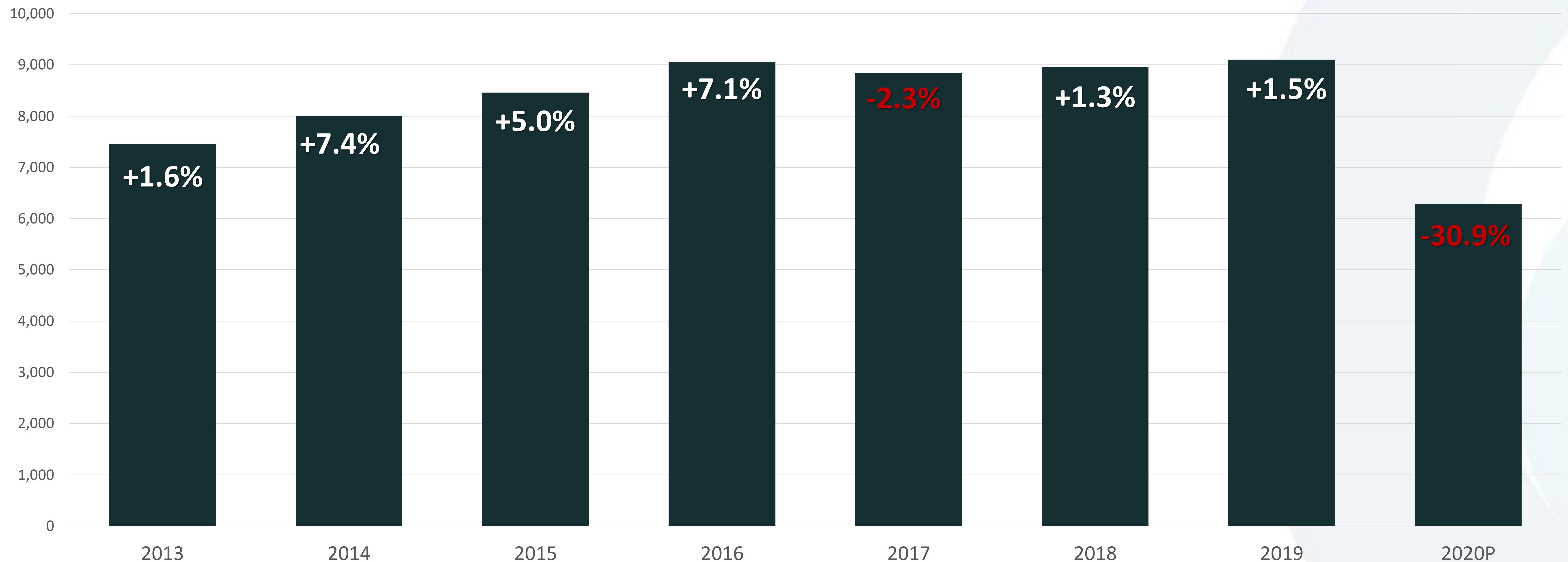
\*Assumes Base=7.0M (2000, DKSA)

SOURCE: HISTORICAL ECONOMETRIC MODEL



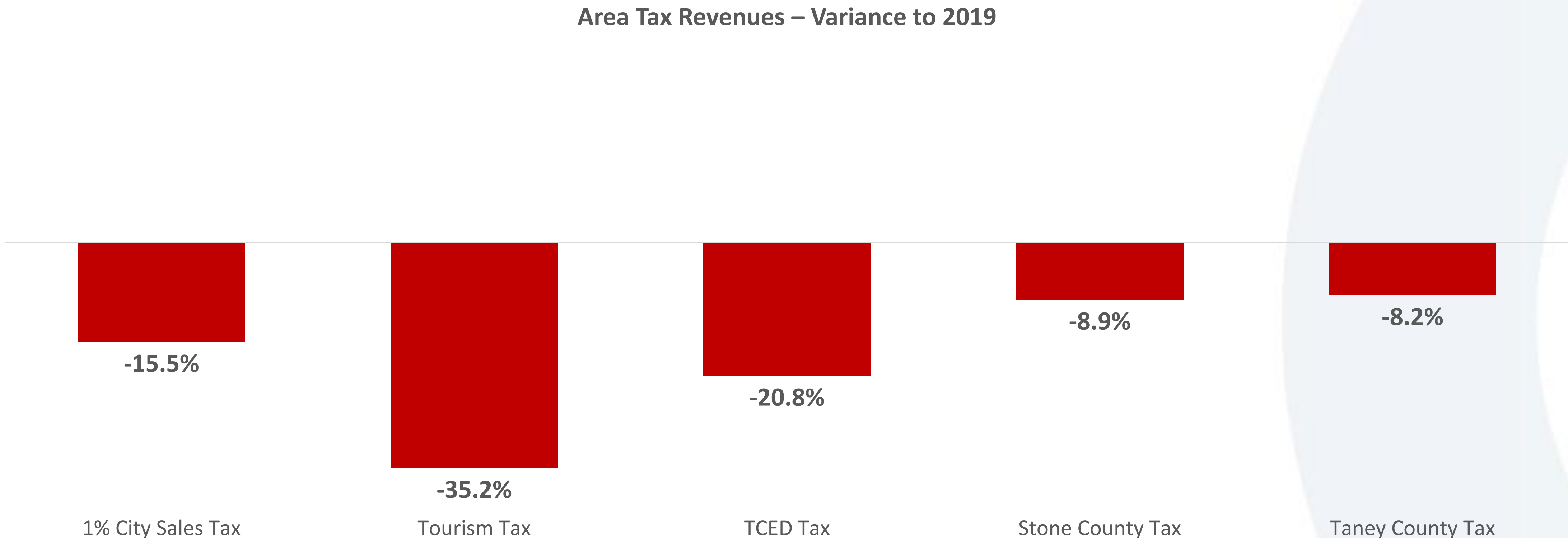
Since 2012 Branson has enjoyed a fairly steady increase in visitation until 2020. And the strong decline driven by Covid-19 is likely to take some time to recover, but our nationwide research indicates that recovery is a matter of when, not if.

History of Visitation to Branson (000s)\*





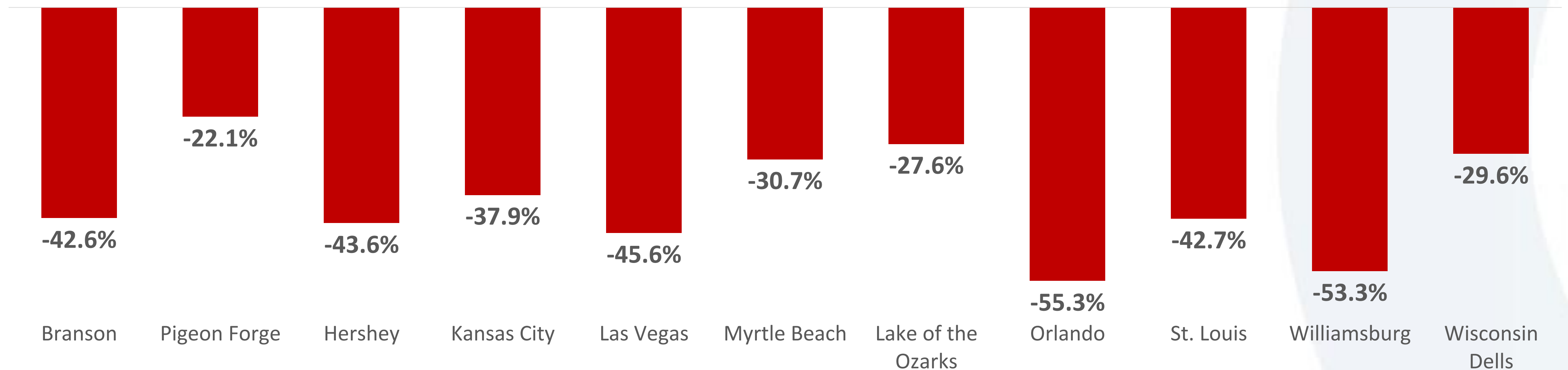
Not surprisingly, all tax revenues tracked took a hit in 2020 with Tourism Tax being the hardest hit.





According to STR, Branson's room demand decreased by nearly 43% in 2020, similar to declines seen in Hershey PA, Las Vegas, and St. Louis. However, it should also be pointed out that room demand was also impacted by the fact that only 41% stayed in hotels in 2020, down from 51% in 2019.

STR Room Demand – Variance to YTD December 2019





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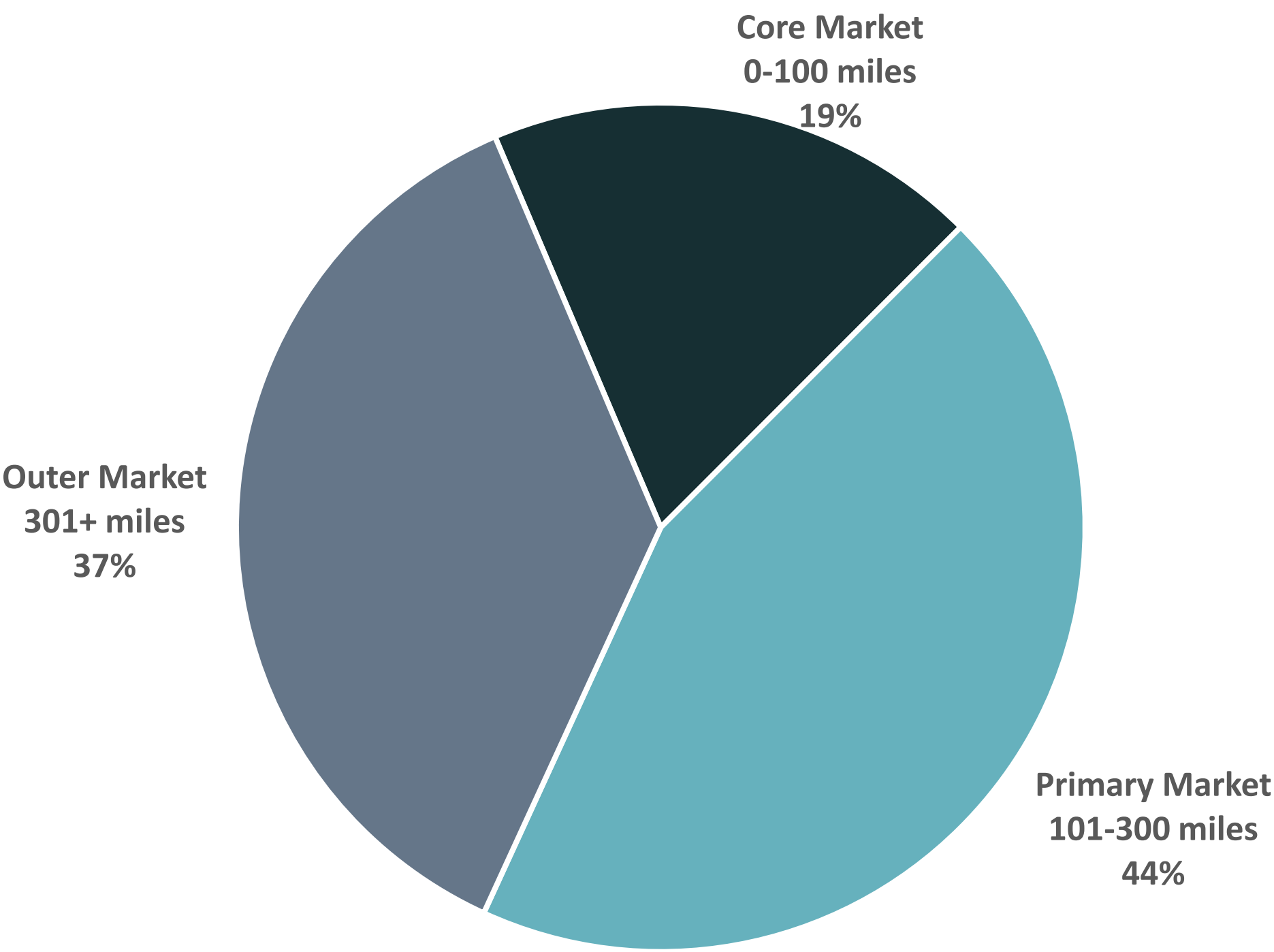
# Behavioral Profile



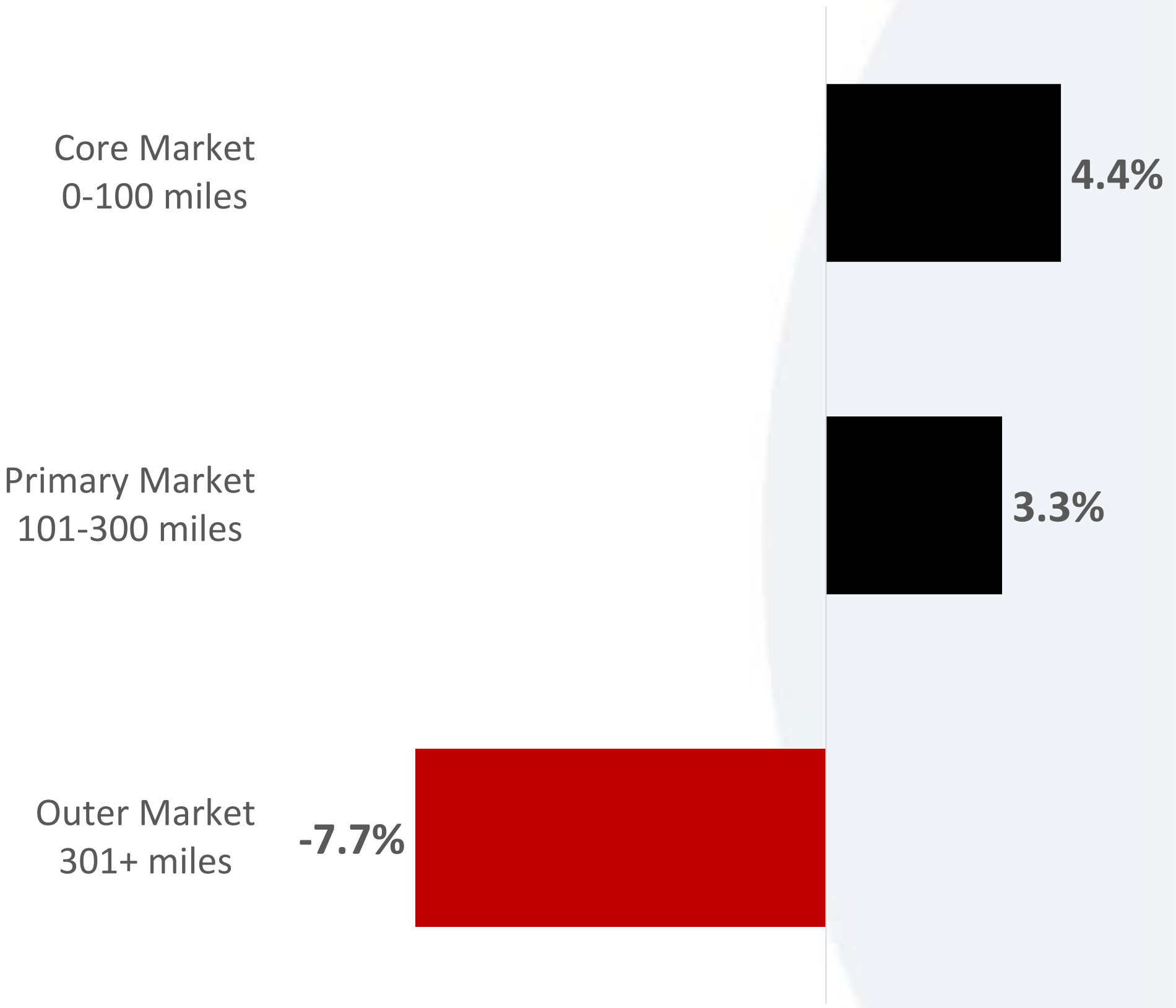


Core and Primary market visitation increased this year as the pandemic caused regional travel to increase around the country - it is also encouraging that 37% of visits came from the Outer Markets.

Distance Traveled to Branson

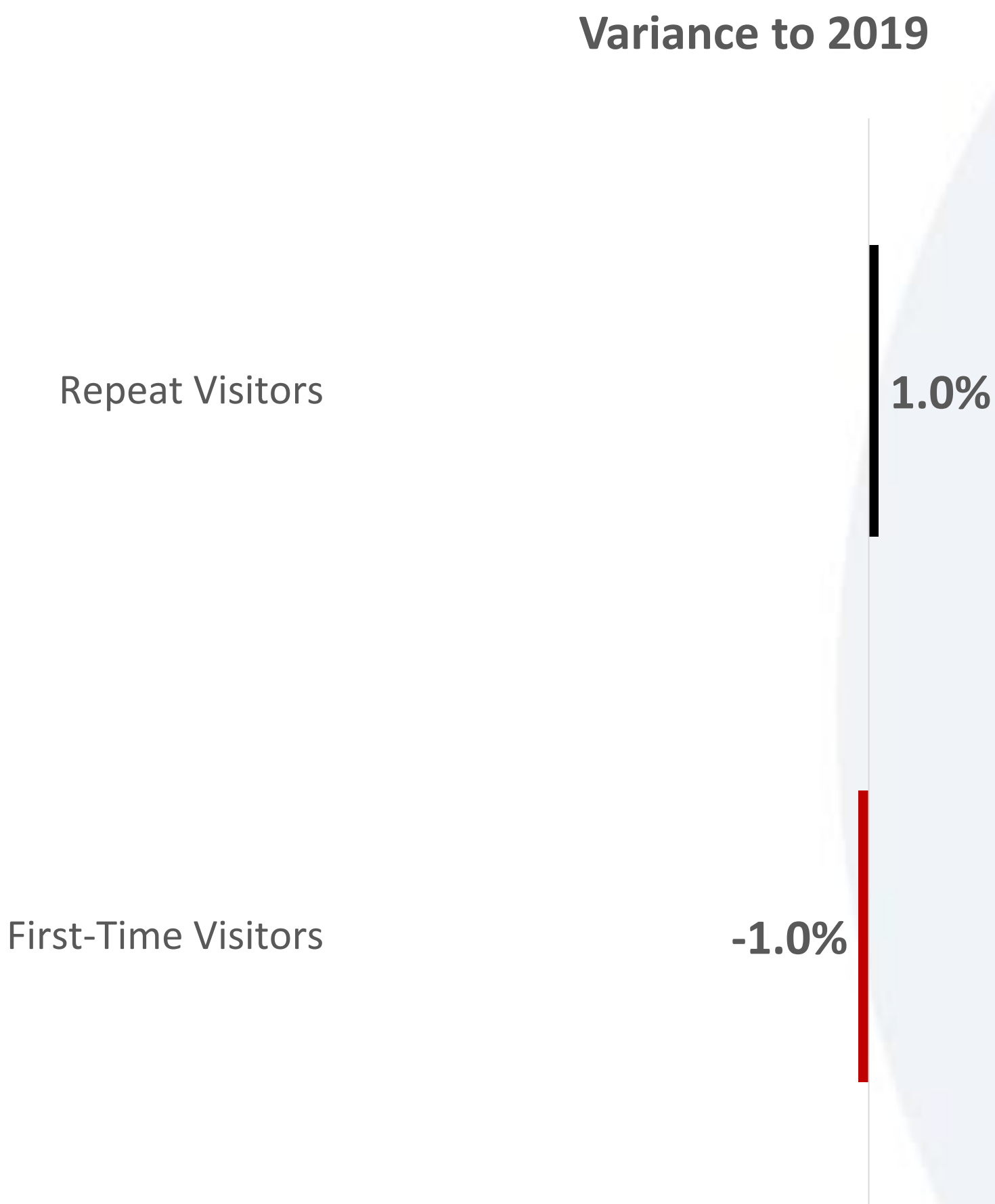
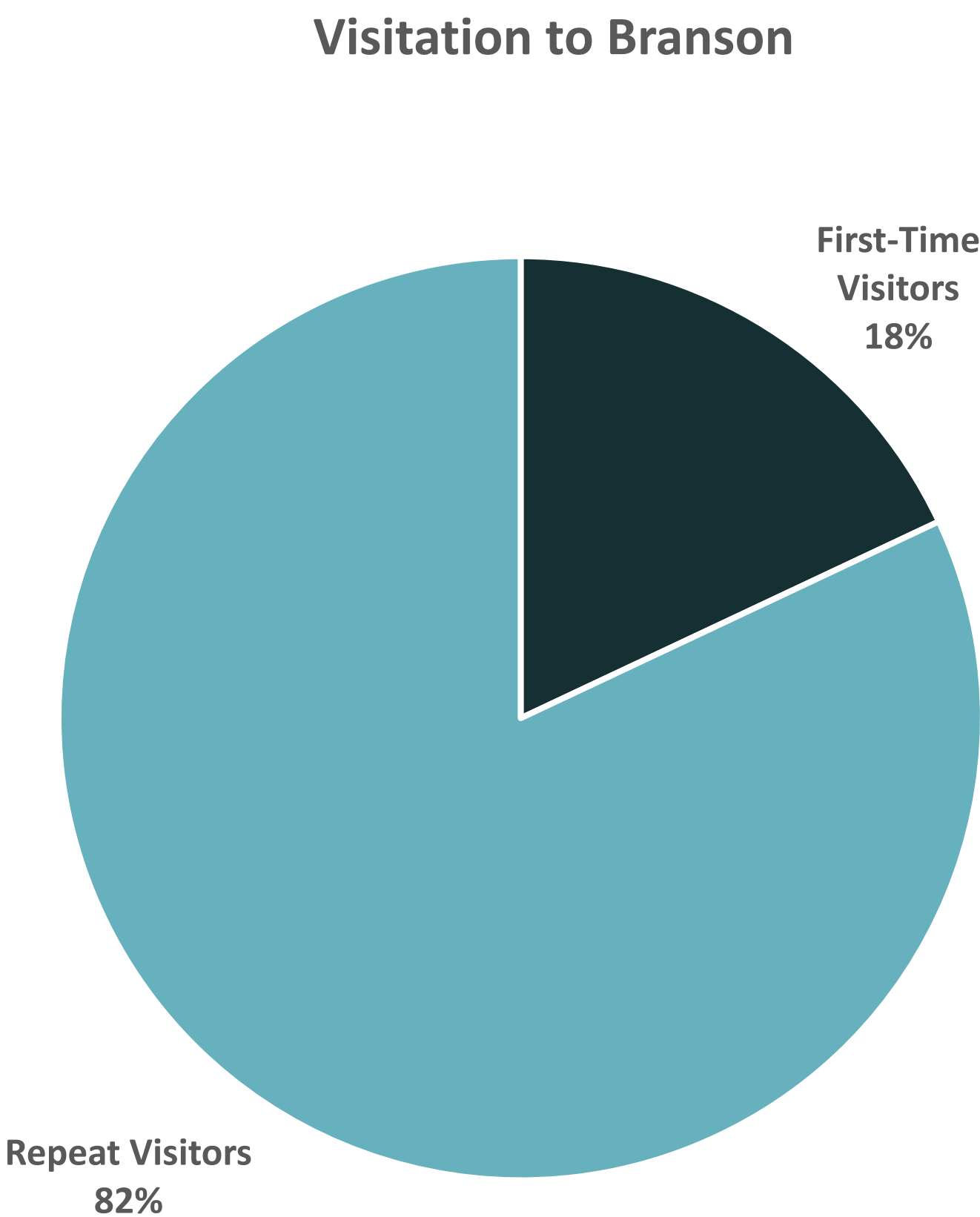


Variance to 2019



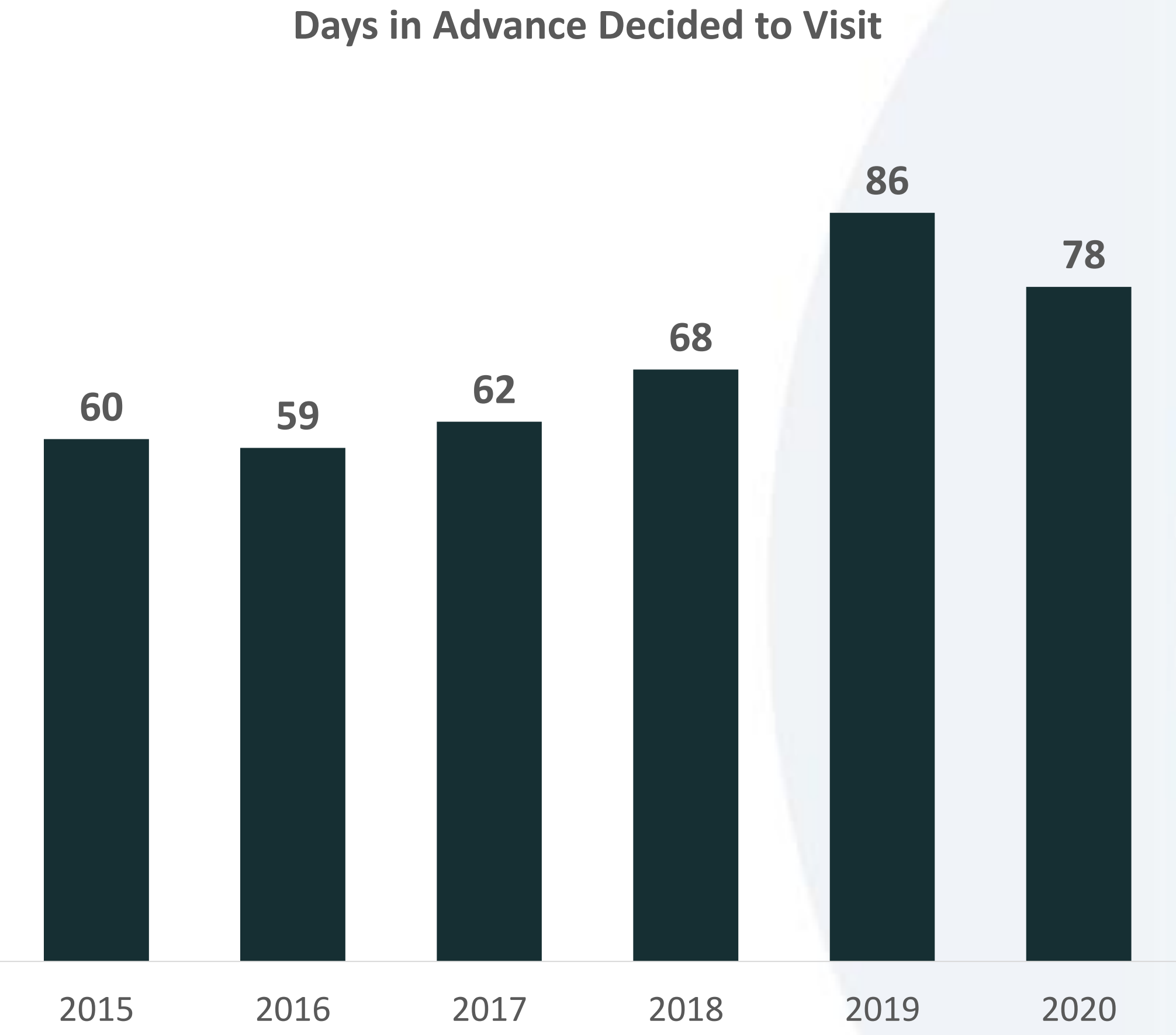
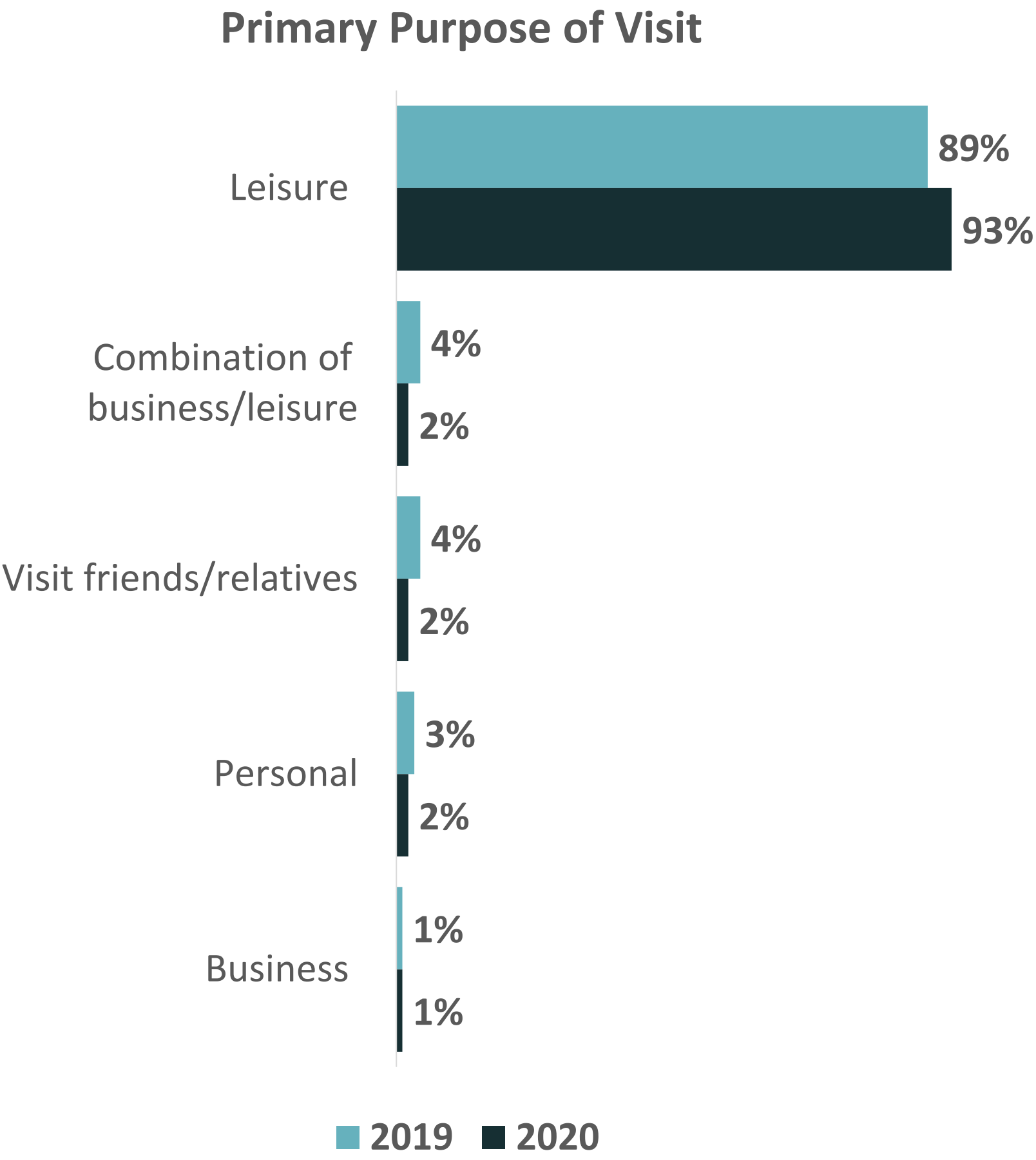


First-time and repeat visitation to Branson remained steady in 2020 despite the upheaval in travel behaviors due to the pandemic.





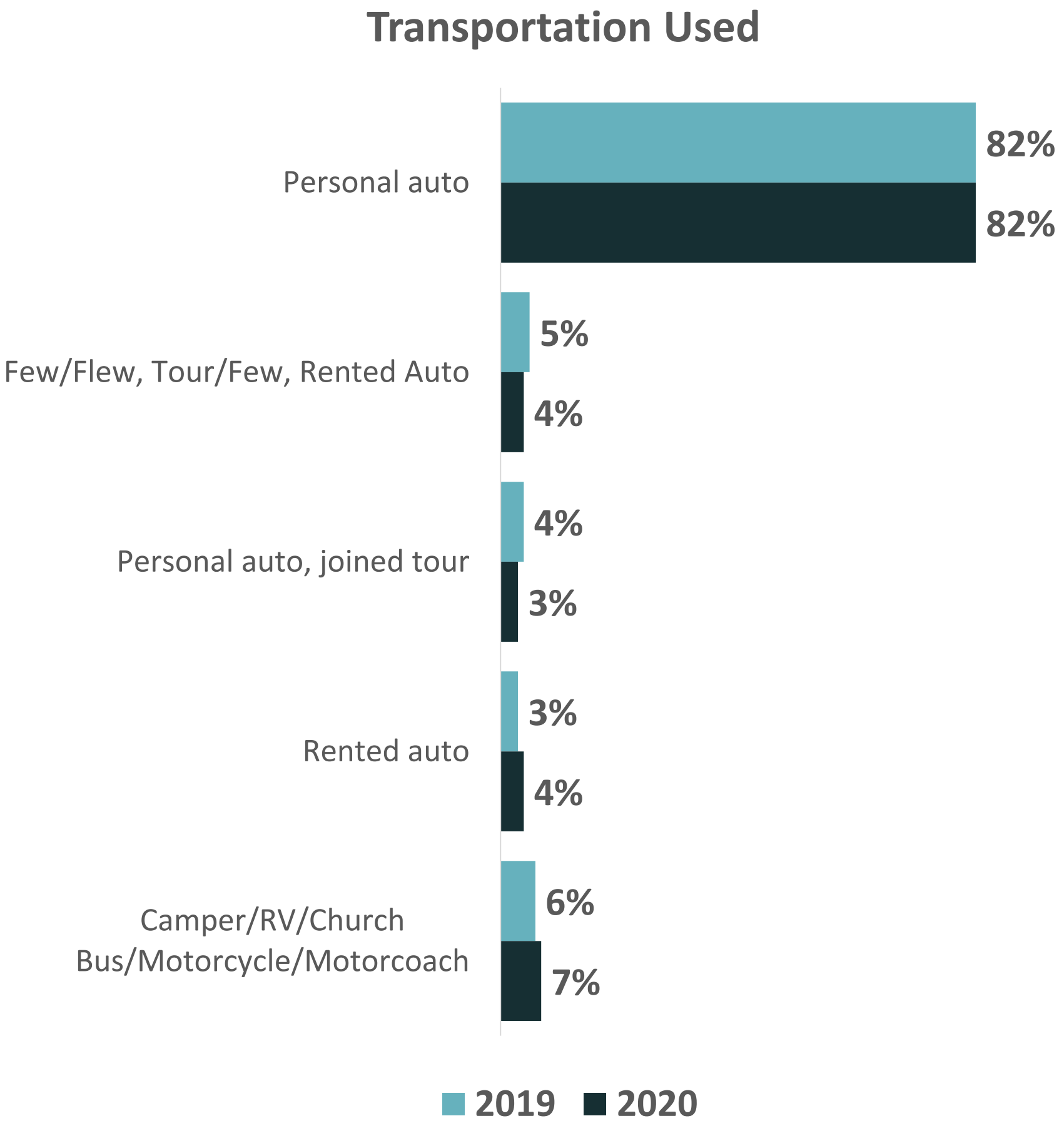
There was an increase in leisure visits in 2020 (+4pts) and visitors are still taking more than 2.5 months to make a decision to visit the area.



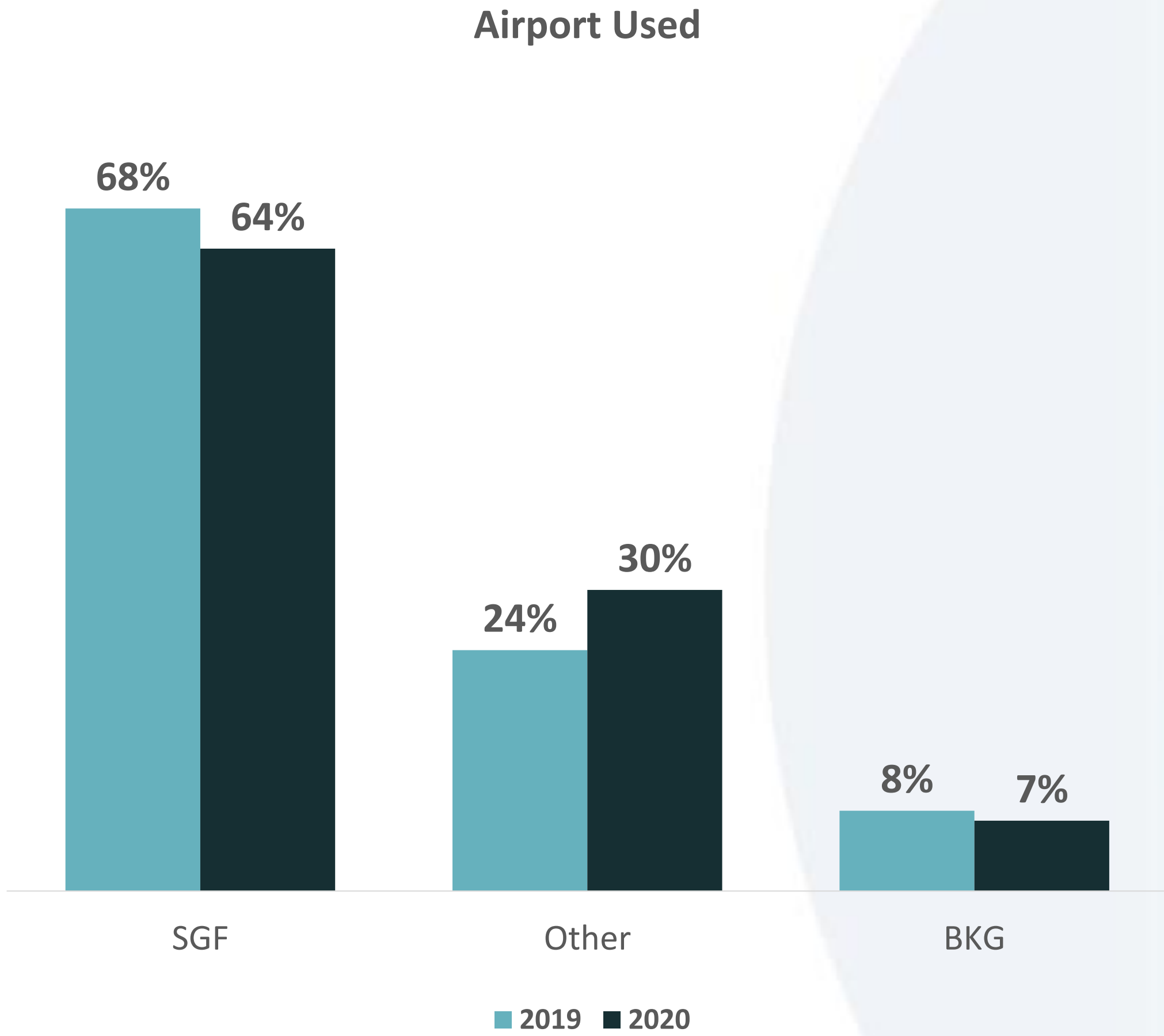
Q4: Which of the following best describes this visit to the Branson/Lakes area?  
Q5: How many times have you visited Branson in the past 12 months - including this visit?



Personal auto remained the most popular way to travel to Branson. Those who flew were most likely to use the Springfield Airport, but SGF saw a decline this year in favor of other airports in the region.



RESPONDENT BASE: ALL RESPONDENTS | N=1,390

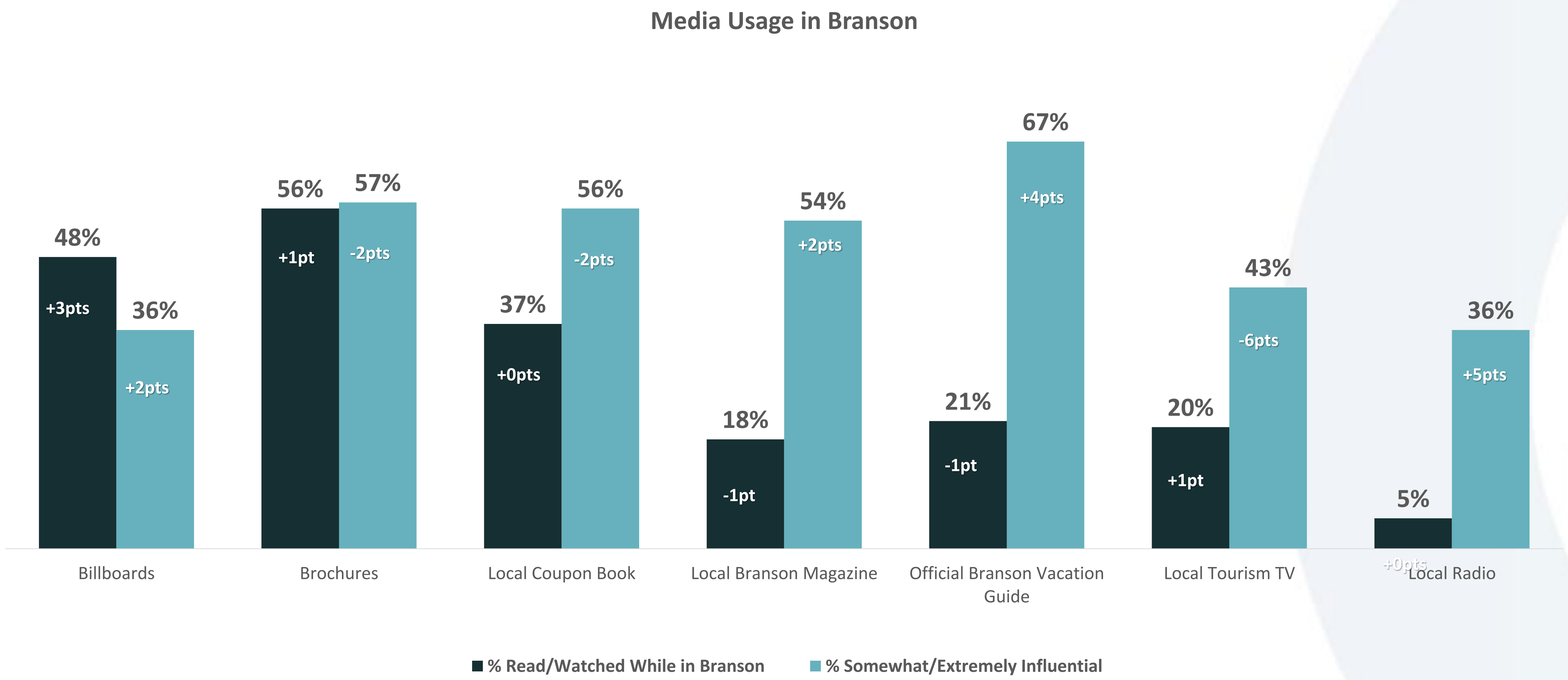


RESPONDENT BASE: RESPONDENTS WHO FLEW | N=61

Q8: How did you travel to the Branson/Lakes area on this most recent visit?  
Q9: Which airport did you use?



Brochures, Billboards and Local Coupon books remain the most used local media, while the Vacation Guide, coupon books and local magazines are the most influential local media sources.



Q10: Which of the following local media, if any, did you read or watch during this most recent visit in Branson? Please select all that apply.

Q11: Using the scale provided, please rate how influential each of these media were at persuading you to visit specific shows, attractions, restaurants, etc. (5-pt. scale)

RESPONDENT BASE: VISITORS WHO SAW LOCAL MEDIA DURING VISIT | 1,116



Live shows remain Branson's biggest functional driver of visitation with Silver Dollar City placing second and Shopping third.



**58%**

Live Shows



**25%**

Silver Dollar City



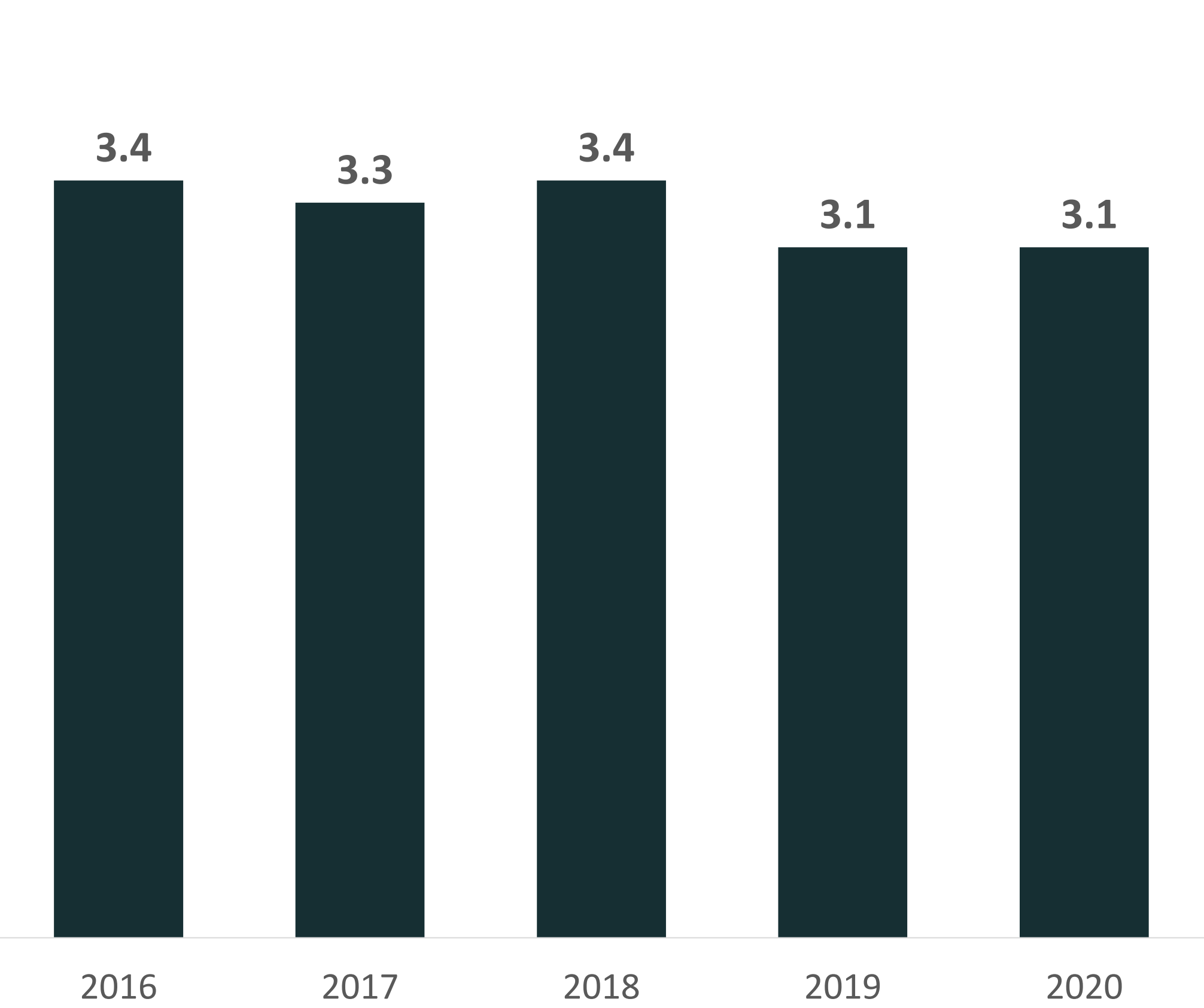
**23%**

Shopping

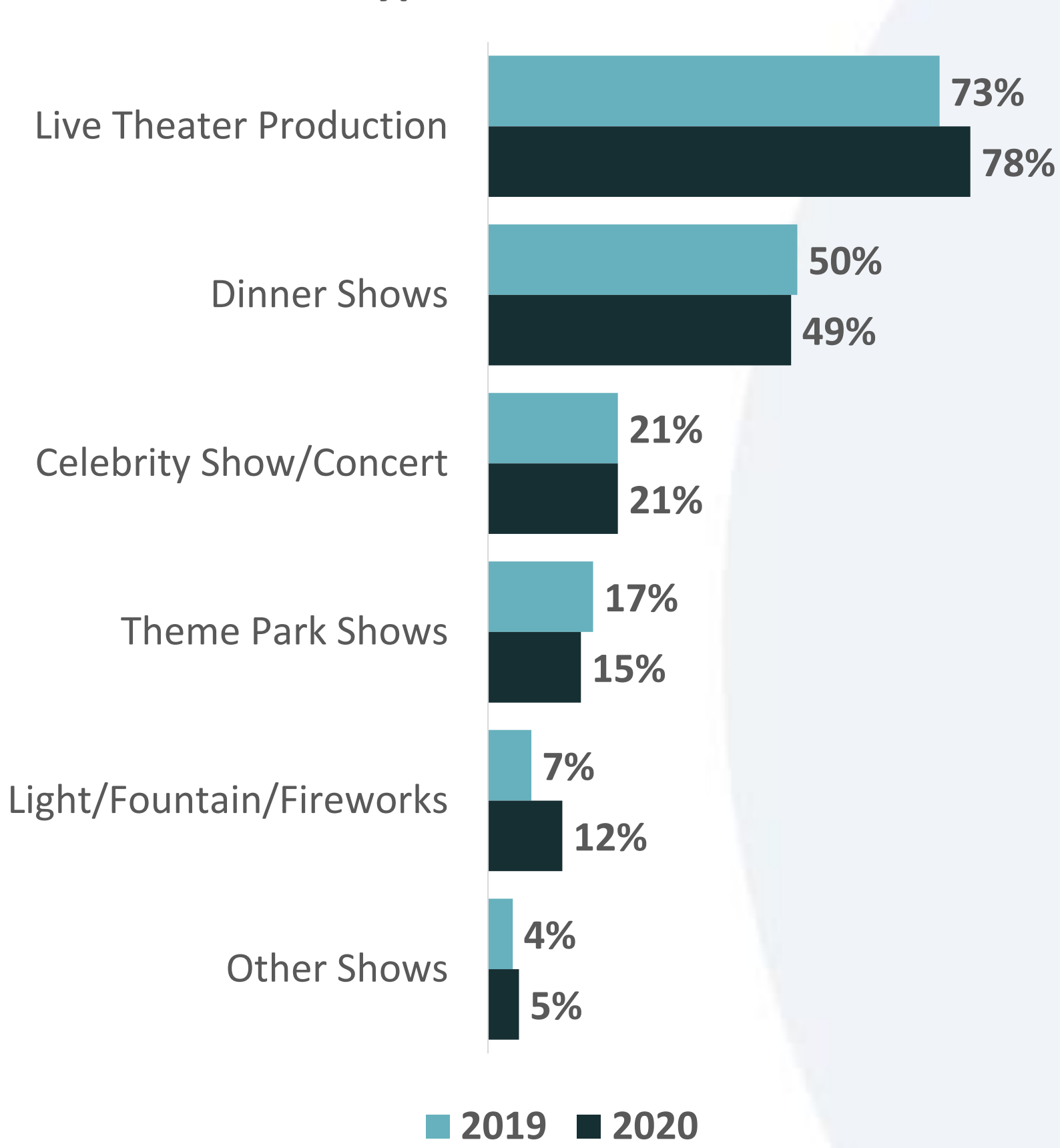


# Visitors are still seeing about 3 shows on their trip to the area, with live theater productions and dinner shows remaining the most popular.

Number of Shows Seen on Last Visit



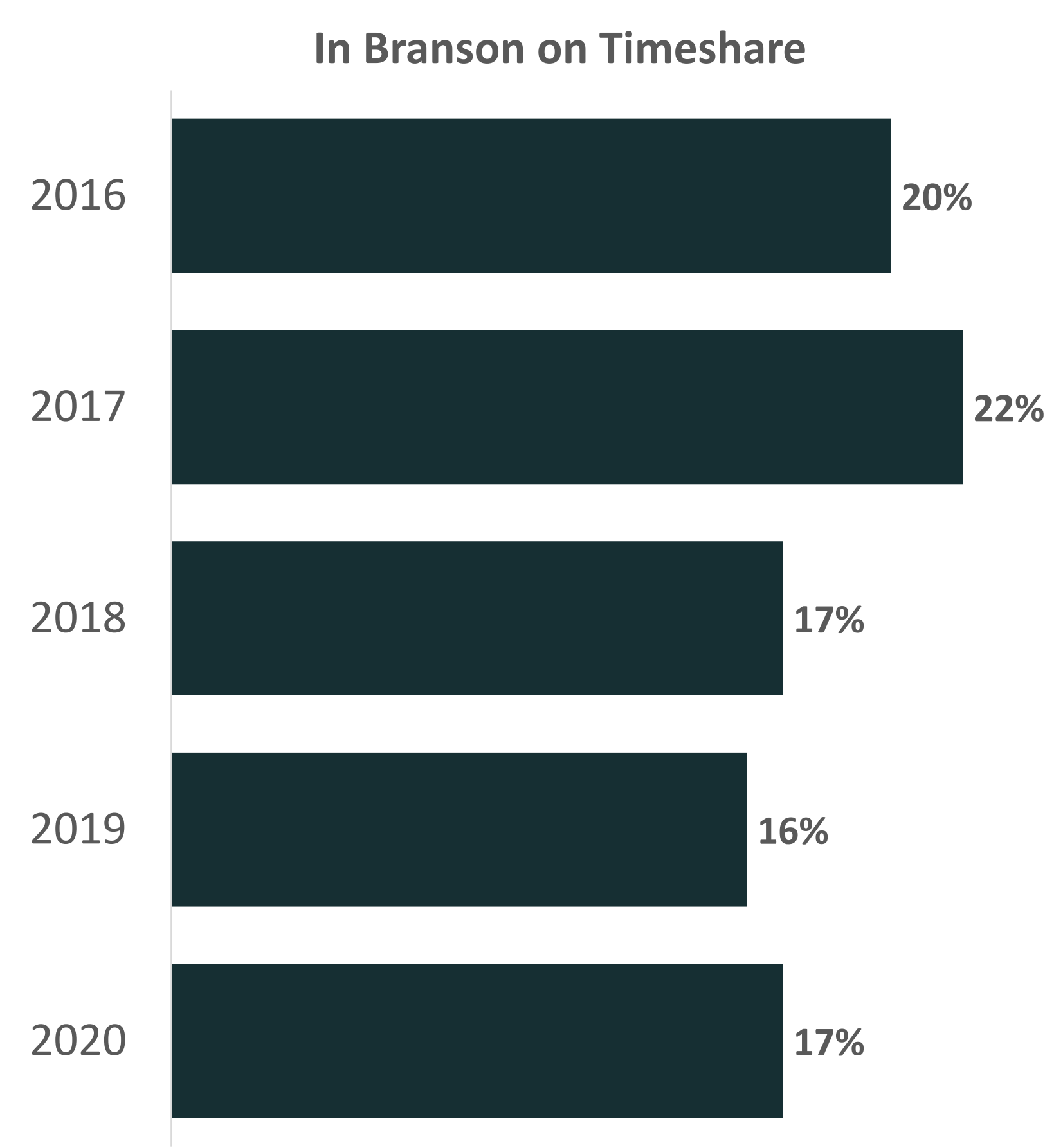
Type of Shows Seen



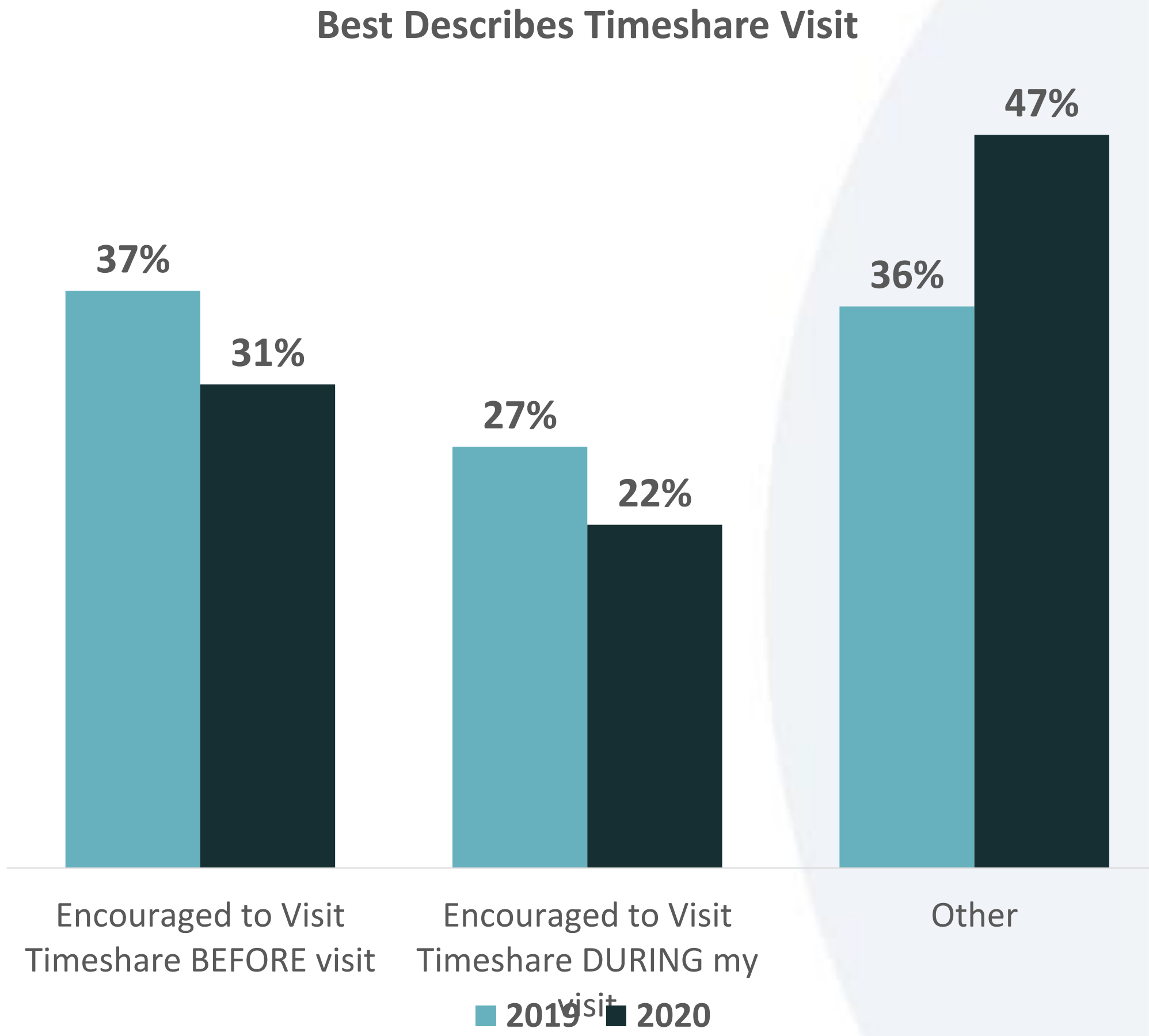
Q15: What is the total number of Branson shows you saw on this visit?  
Q16: How many of these [x] would you say fall into the following categories?



Fewer than one in five visitors were in the area on a timeshare visit, and this year saw a sharp increase in other types of timeshares—the vast majority of which were long-time owners of timeshares in the area.



RESPONDENT BASE: ALL RESPONDENTS | N=1,390

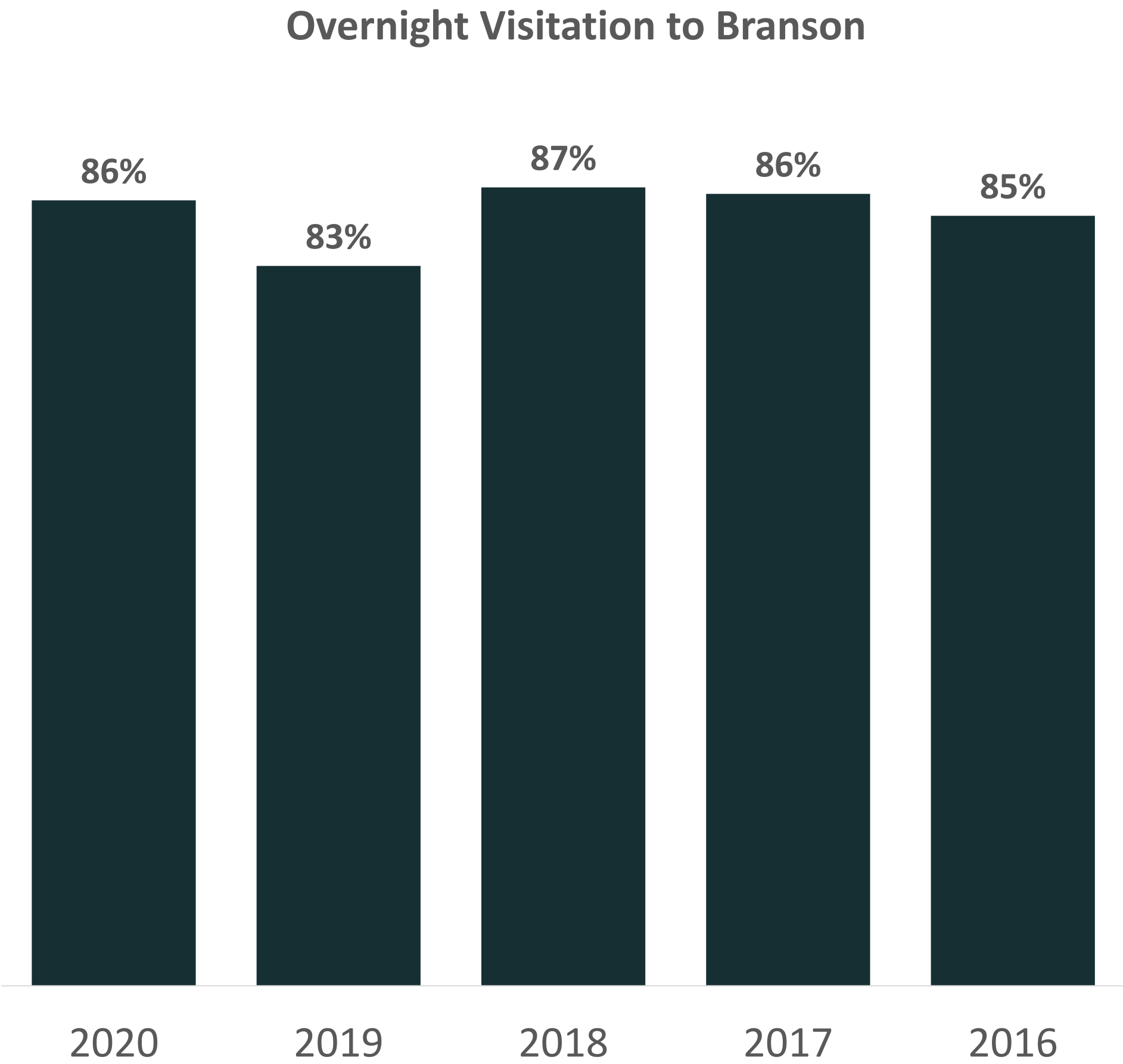


RESPONDENT BASE: VISITED AS PART OF A TIMESHARE | N=241

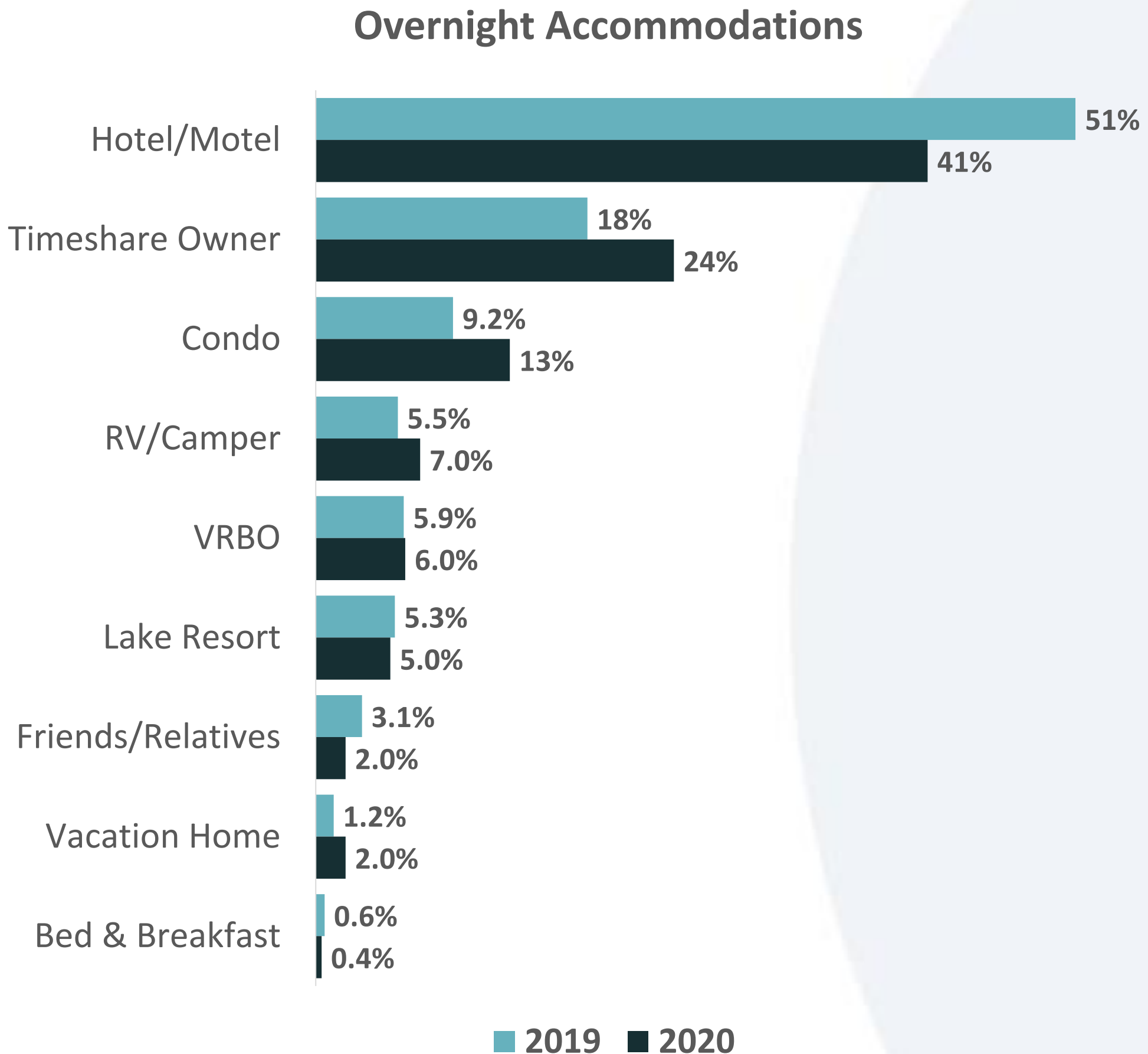
Q17: On this trip, did you visit the Branson/Lakes area as part of a timeshare or vacation club promotional visit?  
Q18: Which of the following best describes your visit:



The majority of Branson visitors stayed overnight on their trip. This year there was a decline in hotel stays due to the pandemic, with hotels remaining the top choice.



RESPONDENT BASE: ALL RESPONDENTS | N=1,390



RESPONDENT BASE: SPENT THE NIGHT IN BRANSON | N=1,193

Q19: How many nights did you spend in the Branson area on your most recent visit?  
Q21: In what type of accommodations did you stay on this visit?



Each party that visited Branson spent more money than ever in 2020. This is not surprising considering most people who traveled in 2020 came from higher income households who weren't hit as hard by the pandemic.



**Party Trip Spending**  
\$1,063

- Past Party Trip Spending
- 2019 - \$986
  - 2018 - \$972
  - 2017 - \$946
  - 2016 - \$911
  - 2015 - \$882

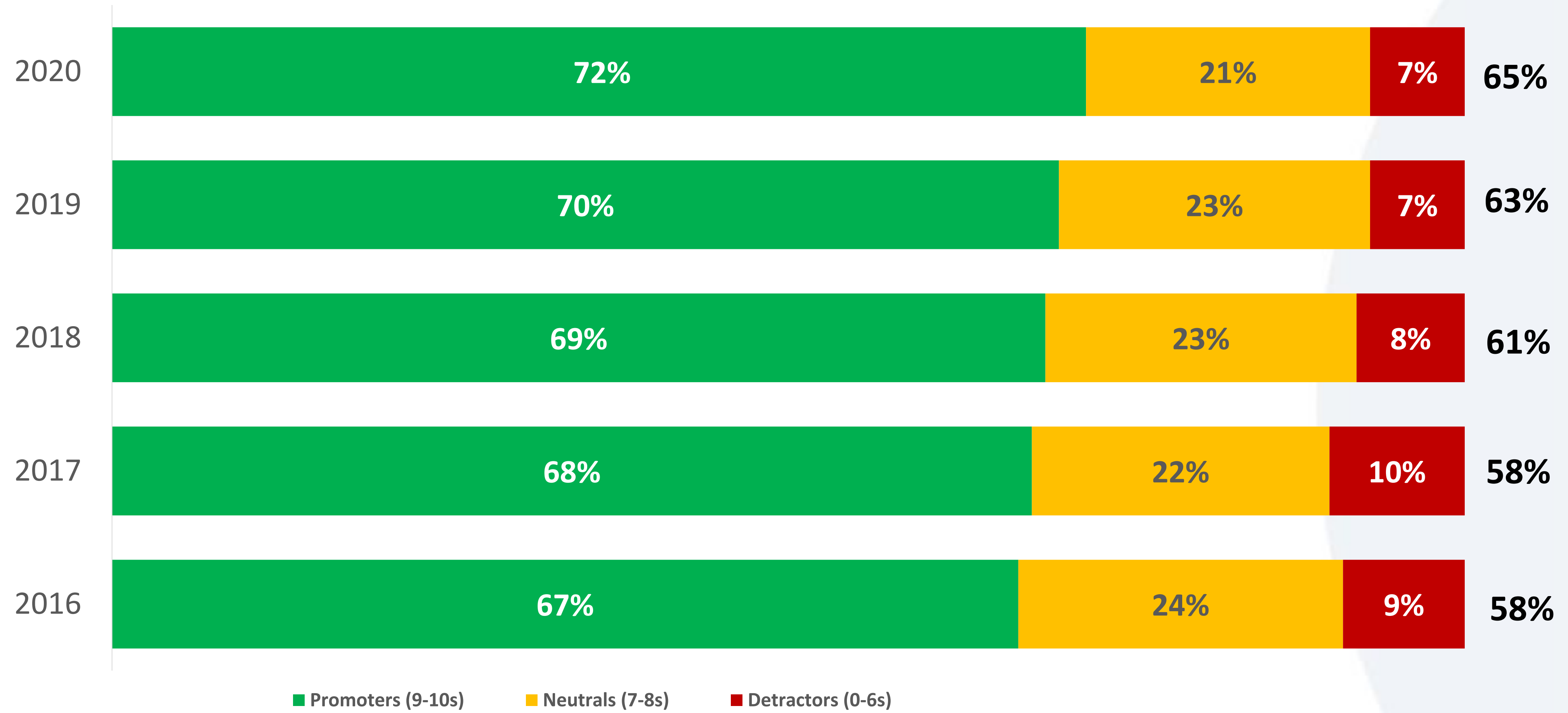


**Per Person Trip Spending**  
\$335

- Past Per Person Trip Spending
- 2019 - \$303
  - 2018 - \$315
  - 2017 - \$279
  - 2016 - \$264
  - 2015 - \$252



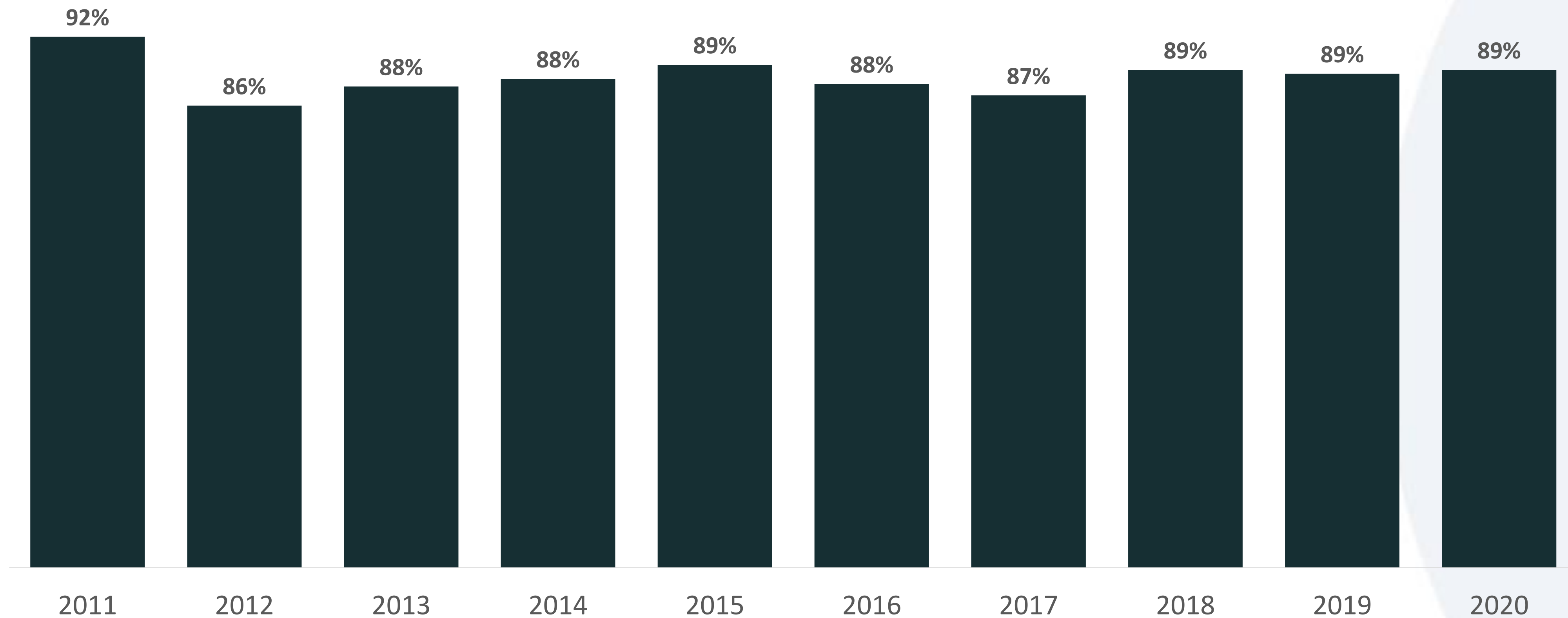
**Branson's Net Promoter Score increased again in 2020 to reach 65%. This was due to a 2% shift of visitors from the Neutral to Promoter category.**





**Intent to return to Branson also held up strong, holding steady at 89% for several years now.**

% Probably/Definitely Will Return to Branson in the Next 12 Months





# Visitor & Target Market Demographics

Because of the pandemic, Branson visitors became much more regional this year—with a 7-point decline in those visiting from beyond 300 miles.

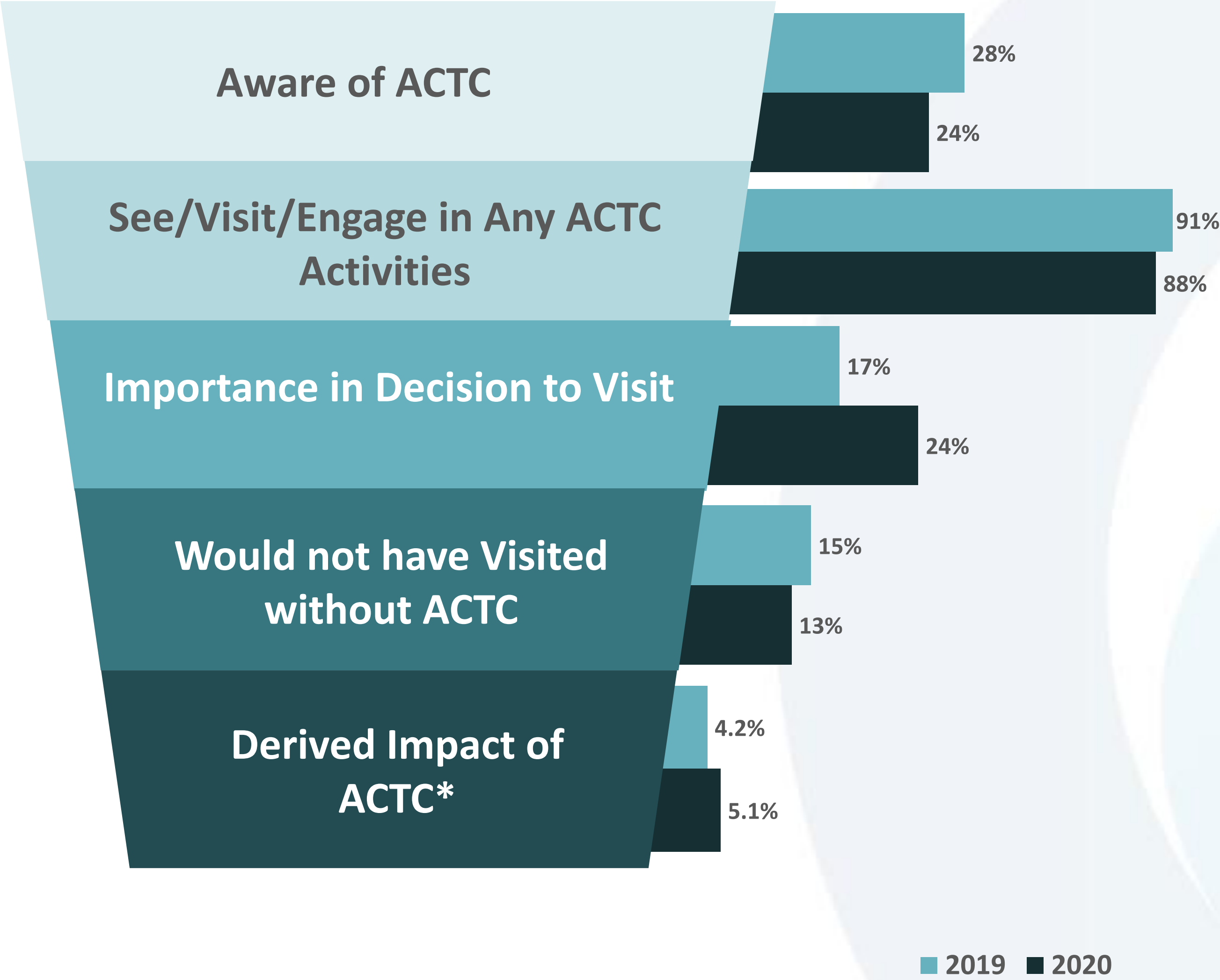
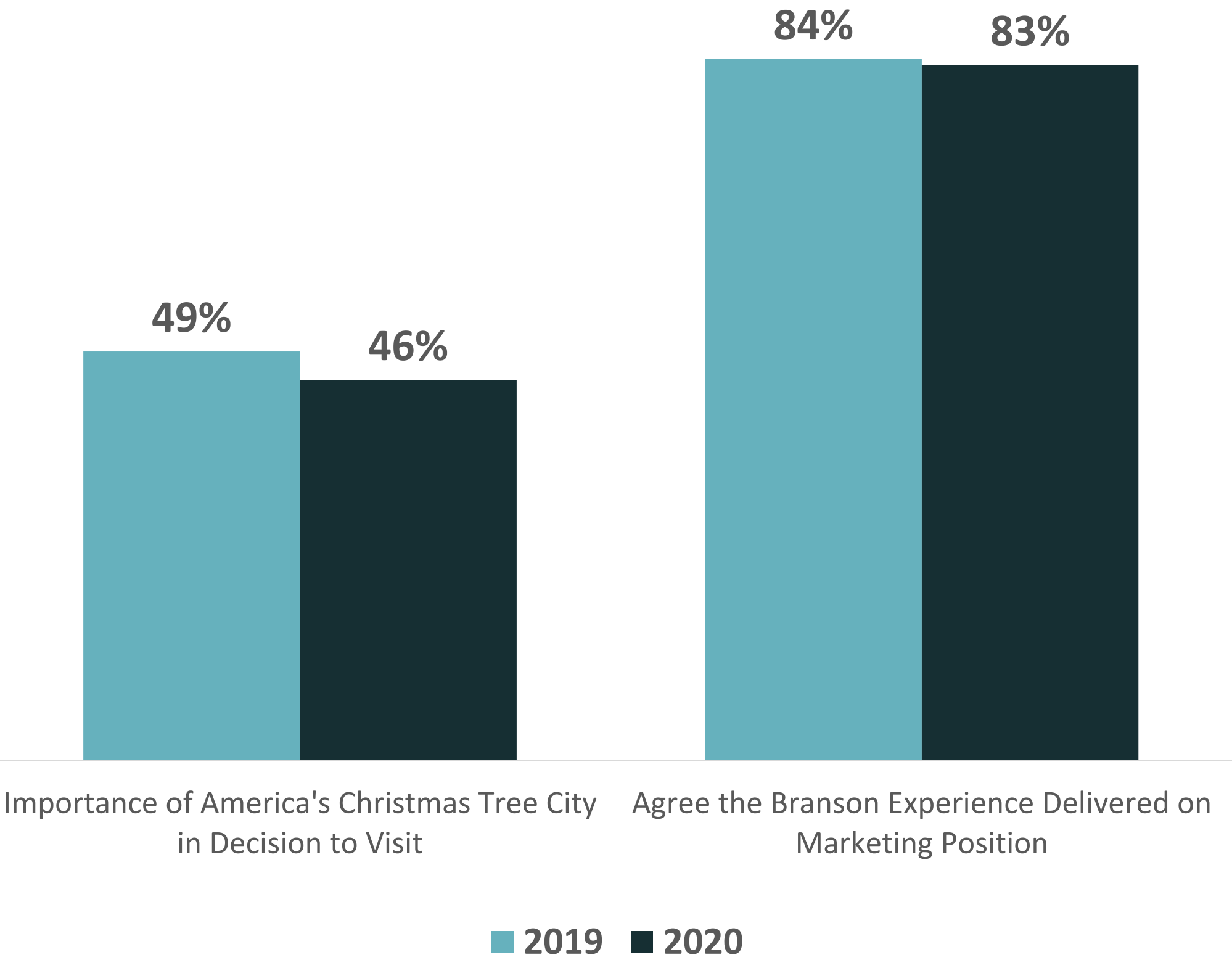
Furthermore, this year's visitor was about 2 years older, significantly more likely to be over the age of 55, significantly less likely to have children and have a significantly higher household income than in years past.

	2017	2018	2019	2020
Average Visitor Adult Age	56	58	55	57
% Under 12	12%	12%	15%	11%
% 12-17	5%	6%	7%	7%
% 18-34	12%	9%	13%	10%
% 35-54	22%	20%	21%	21%
% 55+	49%	53%	44%	51%
Families	40%	43%	51%	43%
Adults	60%	57%	49%	57%
HH Income	\$82.7k	\$84.7k	\$89.3k	\$96.6k
% from Beyond 300 Miles	44%	44%	44%	37%



# America's Christmas Tree City

## Importance and Satisfaction with America's Christmas Tree City



Festival Questions: participation, awareness, would not have visited without festival addition, importance of festival addition, satisfaction with festival, importance of festival in decision to purchase Season Pass, intent to visit  
\*Derived Impact is calculated based on the awareness, participation and importance of the addition.





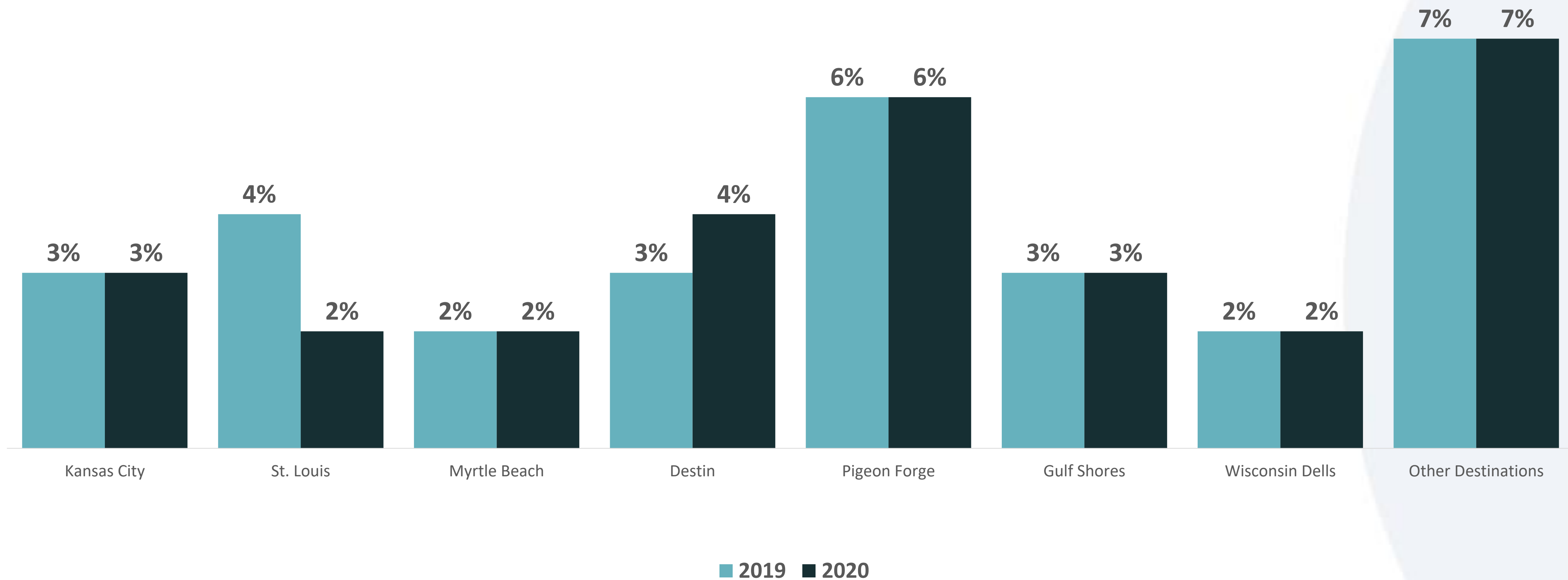
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# Travel Planning & Expectations



**Most travelers did not consider other destinations when considering Branson. Those who did were most likely to consider Pigeon Forge, Destin and other destinations—on par with 2019.**

Destinations Considered When Planning Branson Trip

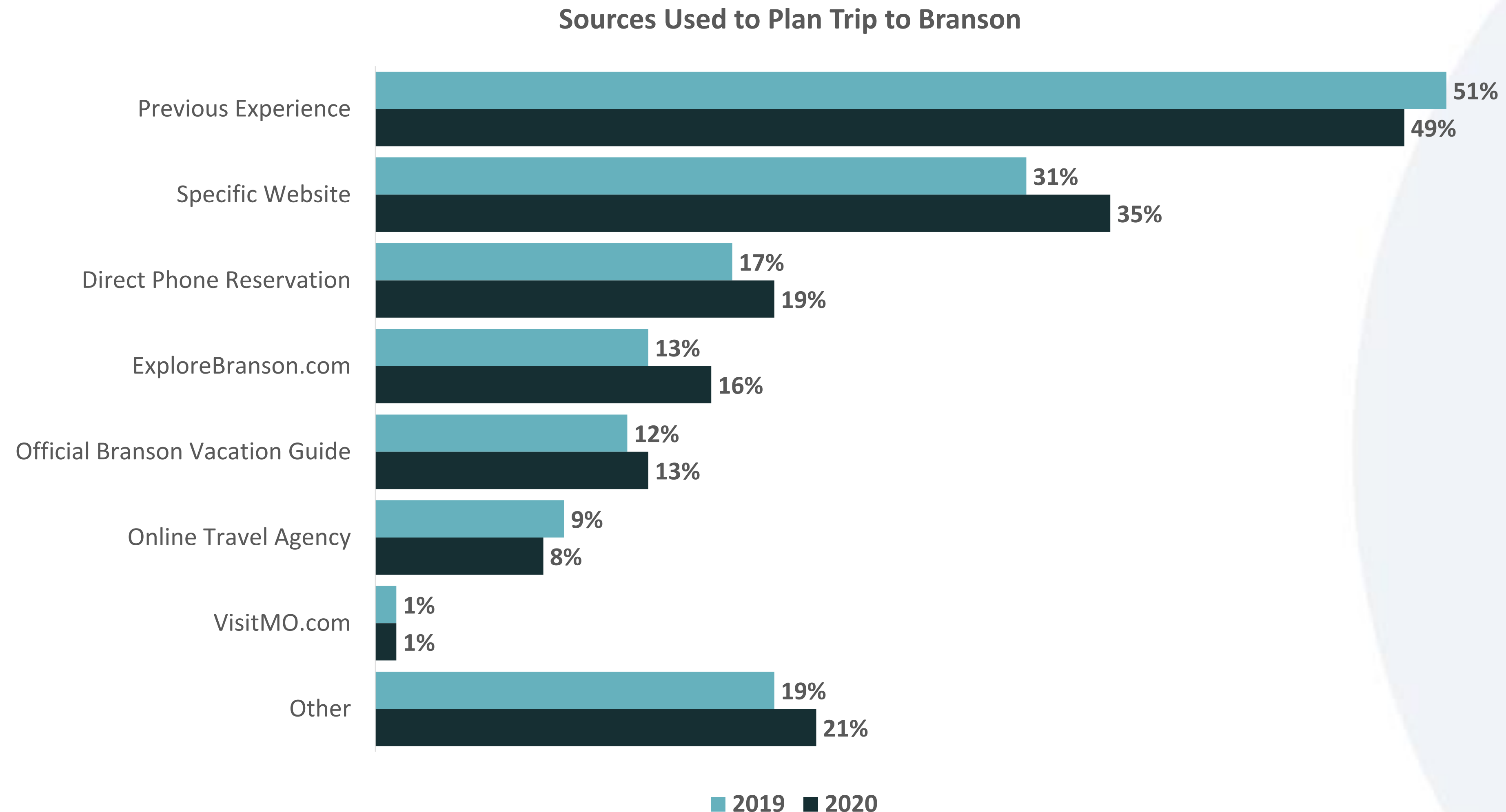


Q1: When making your decision to visit Branson, which other destinations were considered? Please select all that apply.

RESPONDENT BASE: ALL RESPONDENTS | N=1,390



**2020 saw an increase in sources used to plan a visit to Branson replacing some of those who just relied on previous experience. This could be due to travelers unsure of what would be available during the pandemic.**

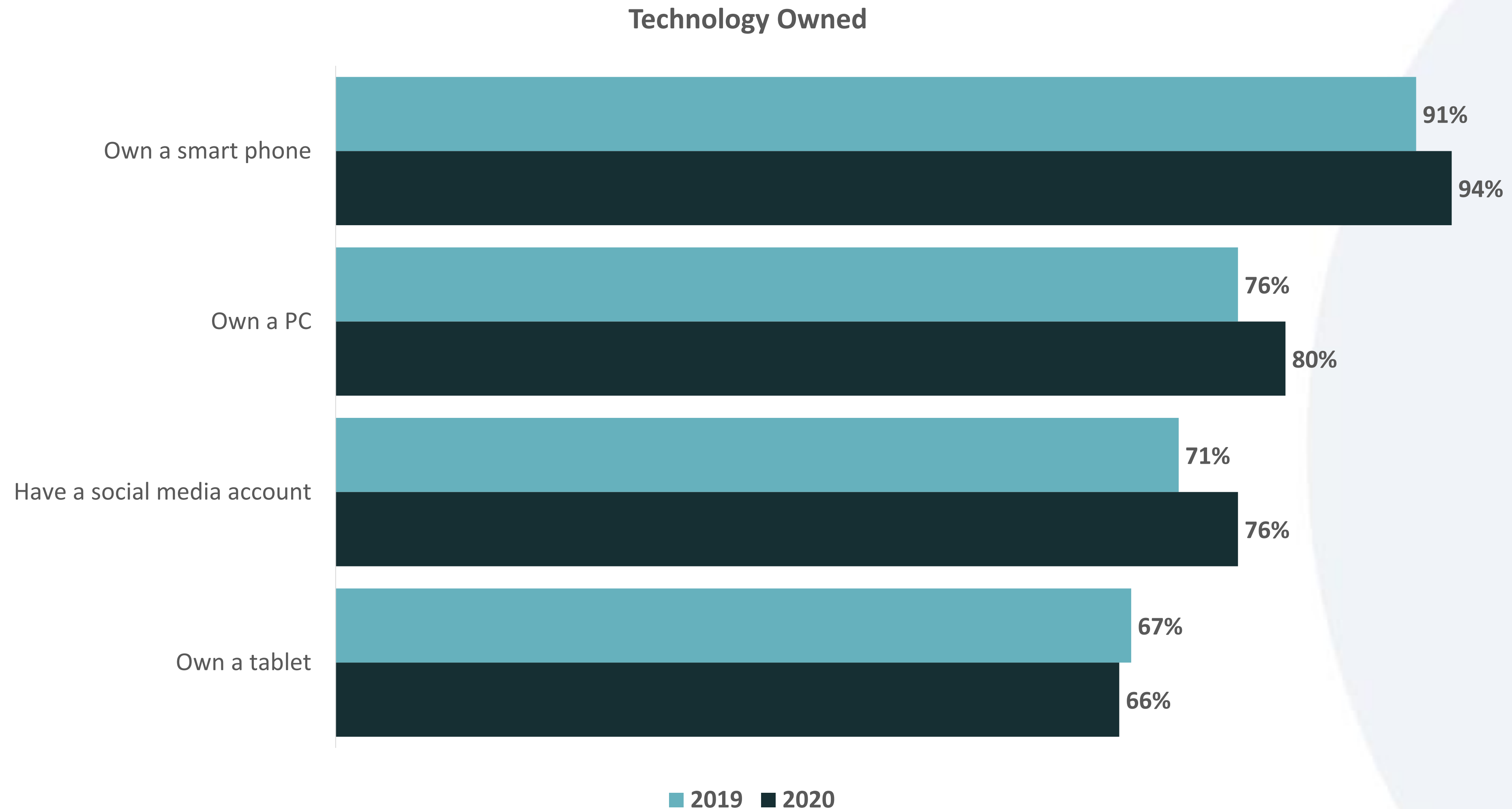


Q6: Which of the following sources, if any, did you use to plan your trip to Branson? Please select all that apply.

RESPONDENT BASE: ALL RESPONDENTS | N=1,390



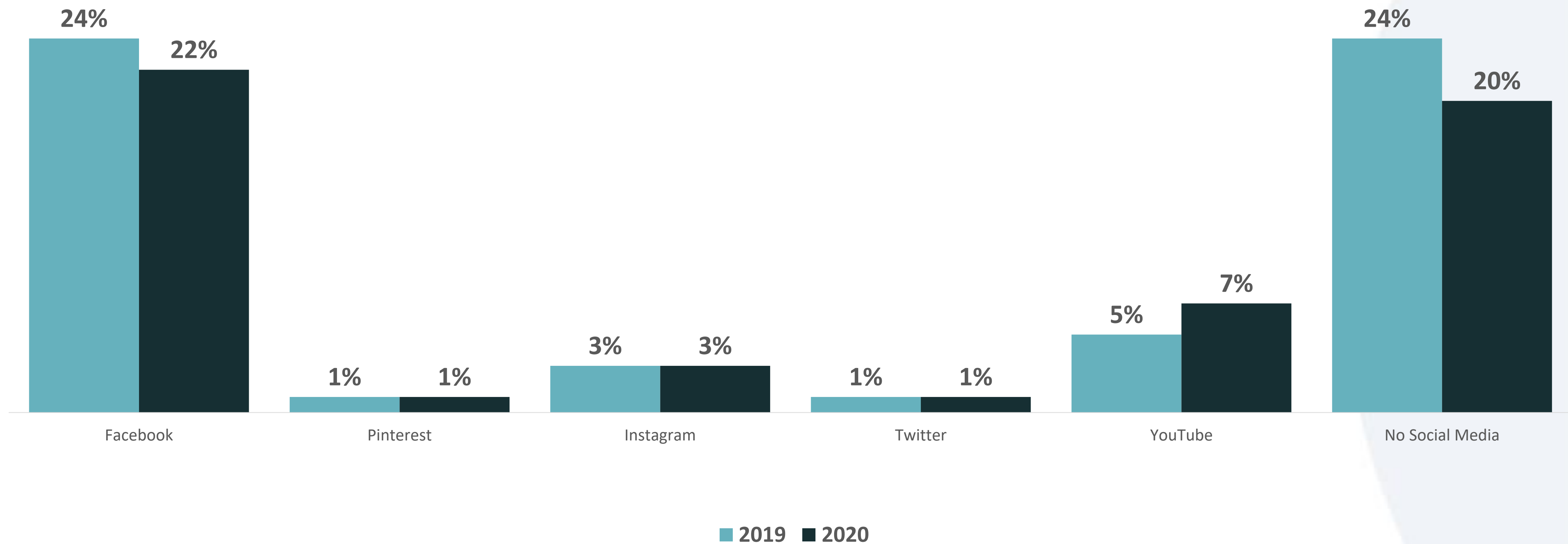
**There continues to be an increase in visitors who own technology such as smart phones, PCs and social media accounts.**





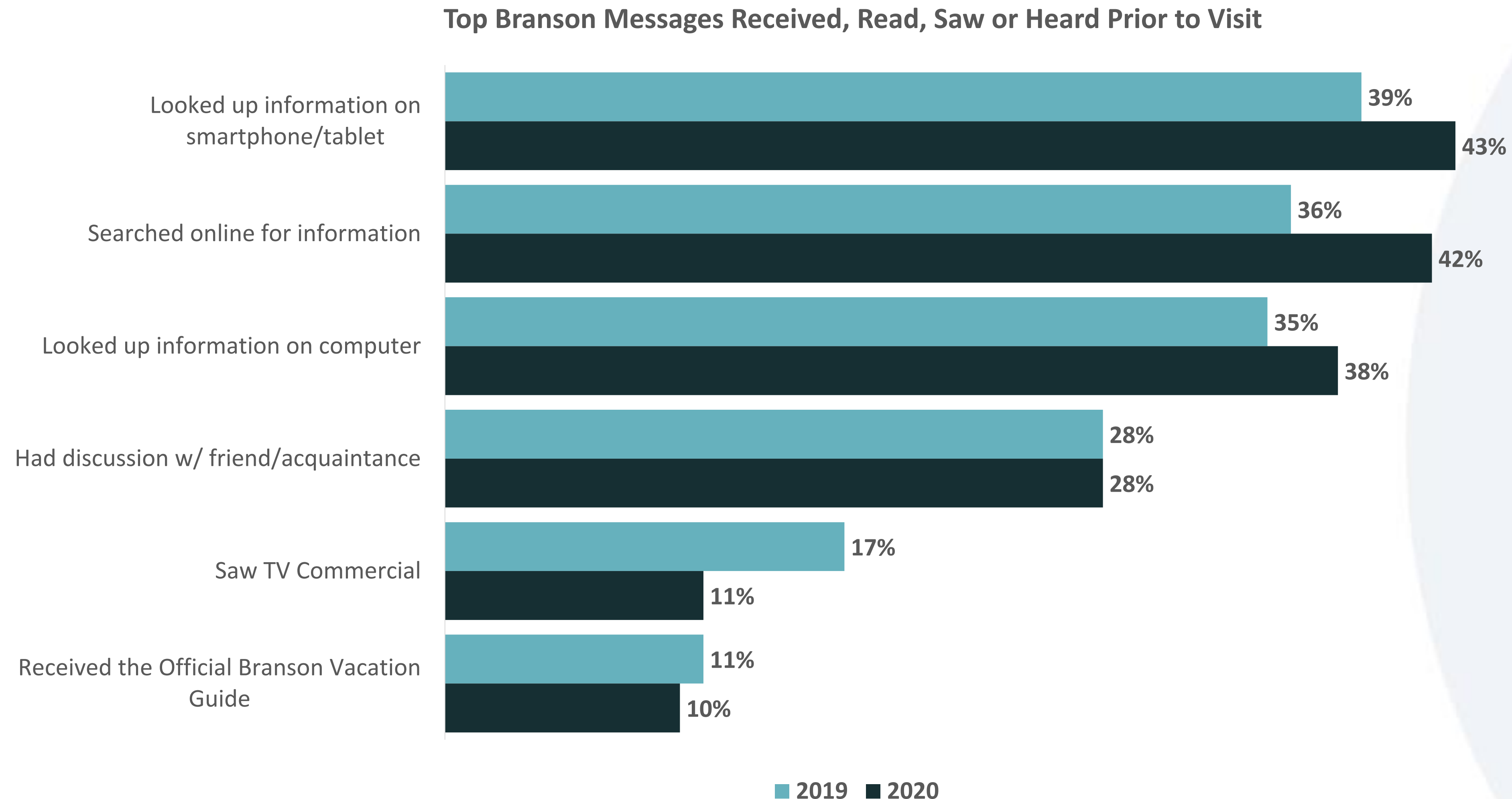
**While more Branson visitors indicated they are using social media, the traditional types of social media haven't increased much.**

Branson Social Media Usage





**Similar to trip planning, the information sources visitors were exposed to prior to their visit was more likely to be online in 2020 when compared to last year.**



Q36: Please indicate which, if any, of the following Branson messages you received, read, saw or heard prior to your visit: Please select all that apply.

RESPONDENT BASE: ALL RESPONDENTS | N=1,390



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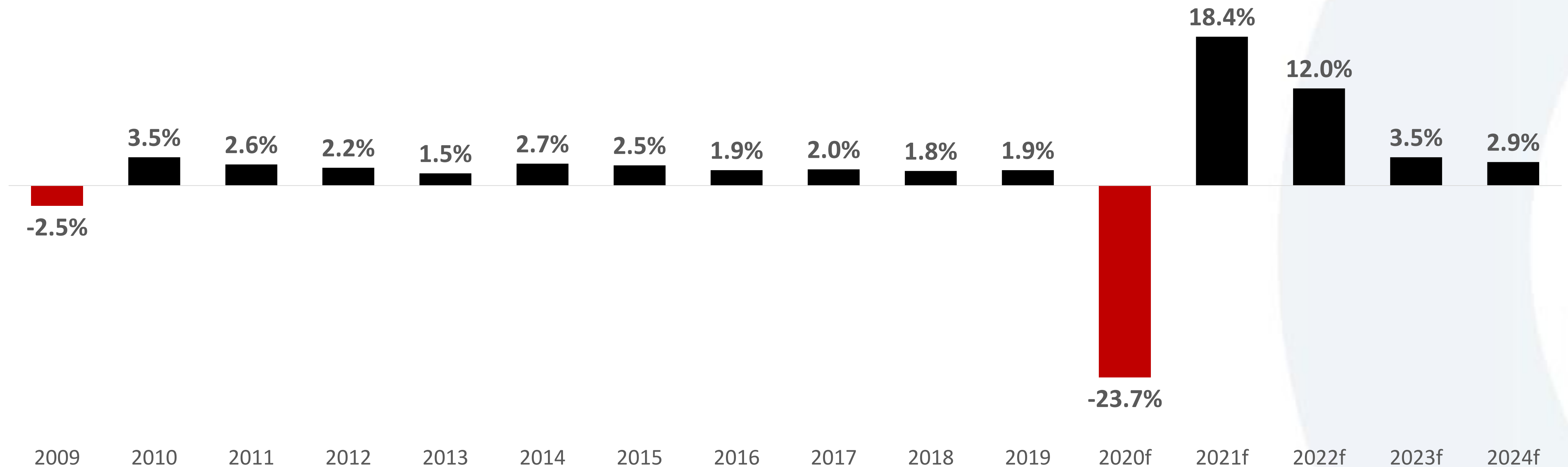
# U.S. Travel Performance





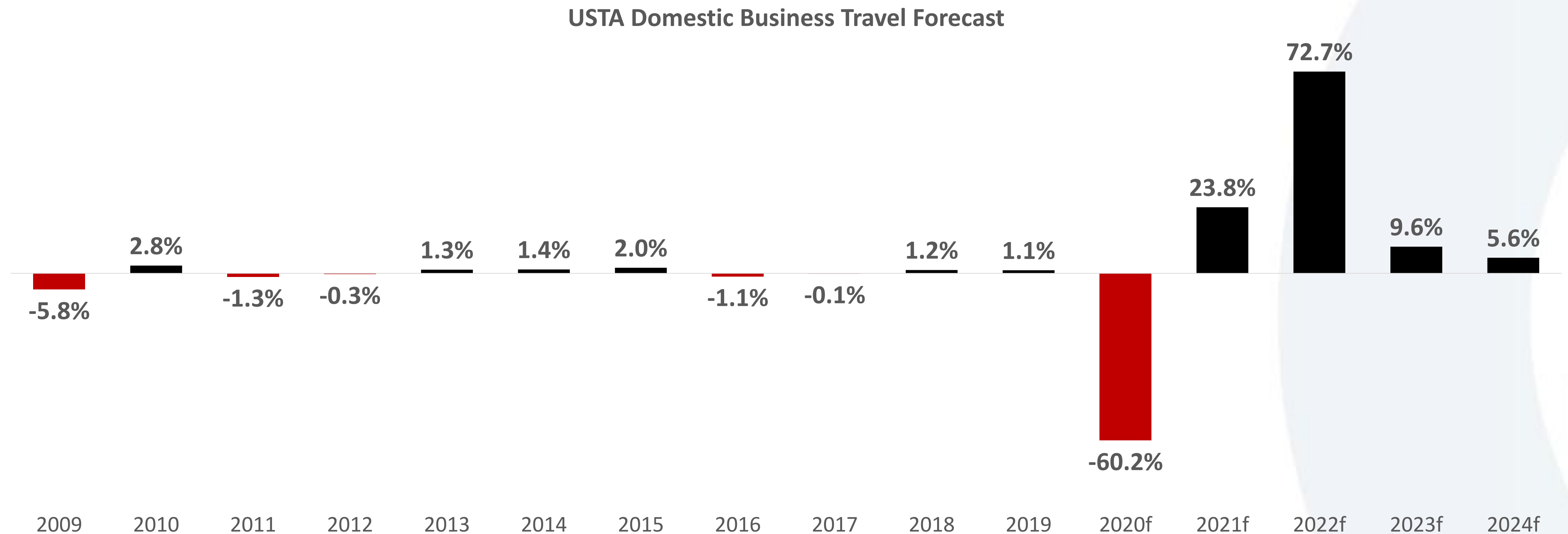
The U.S. Travel Association forecasts that leisure travel will have been down by 24% once the final figures are in for 2020. But also forecasts that it will grow rapidly for the next 2 years to (hopefully) make up for those losses.

USTA Domestic Leisure Travel Forecast





The U.S. Travel Association forecasts that business travel was impacted even more in 2020 and will take until 2022 to really grow and make up those losses.







GREETINGS  
FROM

*THANK YOU*

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